

BCBid

Ministry Buyer Guide

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 Contract Award Notices.
- Suppliers can subscribe to or renew e-Bidding accounts and opportunity subscriptions, view and respond to opportunities (some via e-Bids), manage a dashboard of their opportunities and communicate with buyers.

This guide provides instructions to Ministry Buyers on how to use the BC Bid.

How to Use this Guide

Hyperlinks throughout this guide take you to the appropriate sections, as well as to short video clips demonstrating key functions.

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**.

Abbreviated versions of this document are available as Quick Reference Guides (QRGs) 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 such as instructions that will have impact further ahead in the process or provides 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

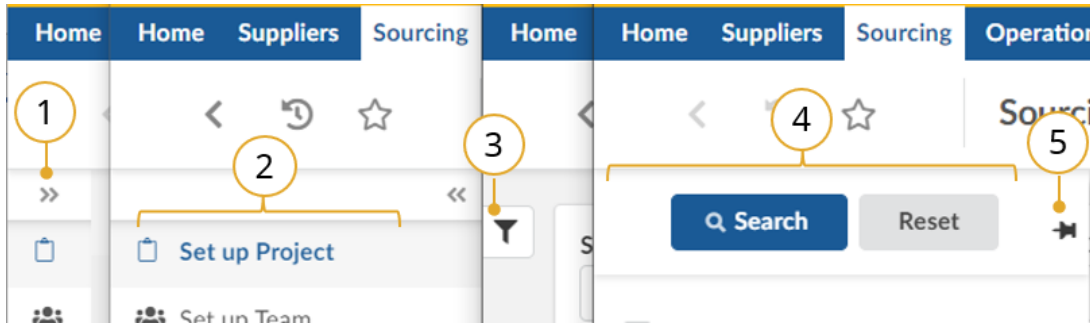
This section describes some general functionality of BC Bid.

Browser Types

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

If using Firefox, note that Firefox has pop-up blocking functionality that can impede the workflow functionality: do not click “Don’t allow env.ivalua.ca to prompt you again”.

Expand/Collapse Menu



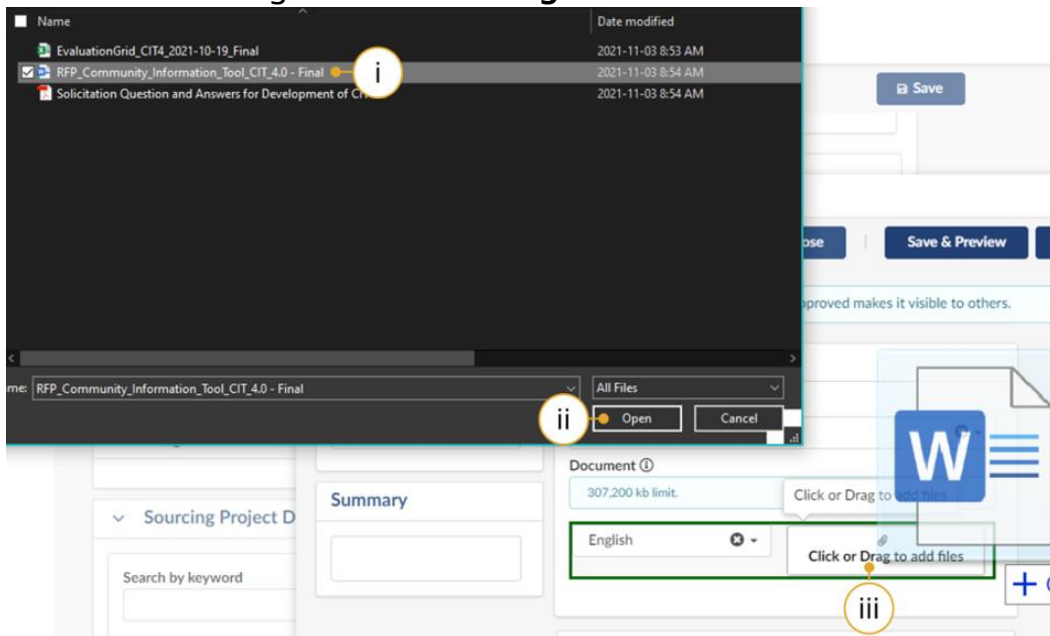
1. The left-hand menu can be expanded or collapsed by selecting the **double arrow**. When collapsed the icon related to each step is visible, hover over the icon to see the name.
2. Expanded.
3. Filters on tables can be expanded by clicking the **funnel icon**.
4. Expanded.
5. Click **pin icon** to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

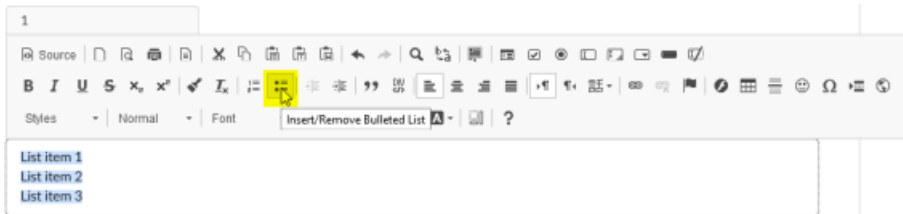
File uploads are limited to 500 MB. An individual file of 500MB can be uploaded. If multiple files are being uploaded at the same time, the total size must also be under 500 MB. File types include common business application file types. There are an unlimited number of attachments.

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”

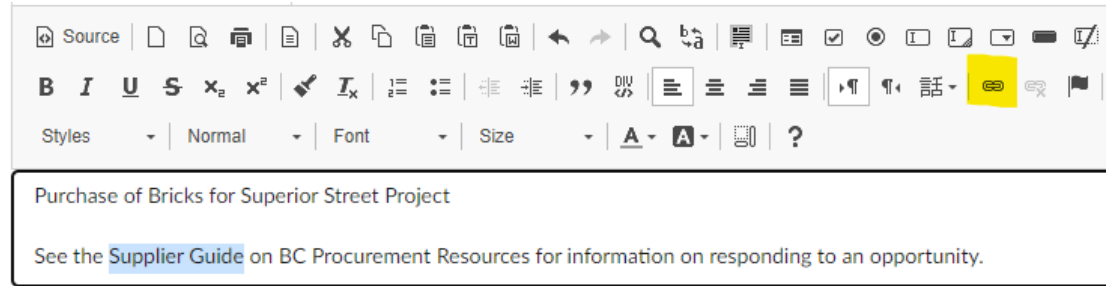
In many instances throughout BC Bid, you will make selections in a dialog box. In cases where you do not see a Save & Close button, click the “X” at the top-right of the dialog box, the application saves your entry.

Adding a Link to a Text Field

Create New Link

To create a new link directly from a web page:

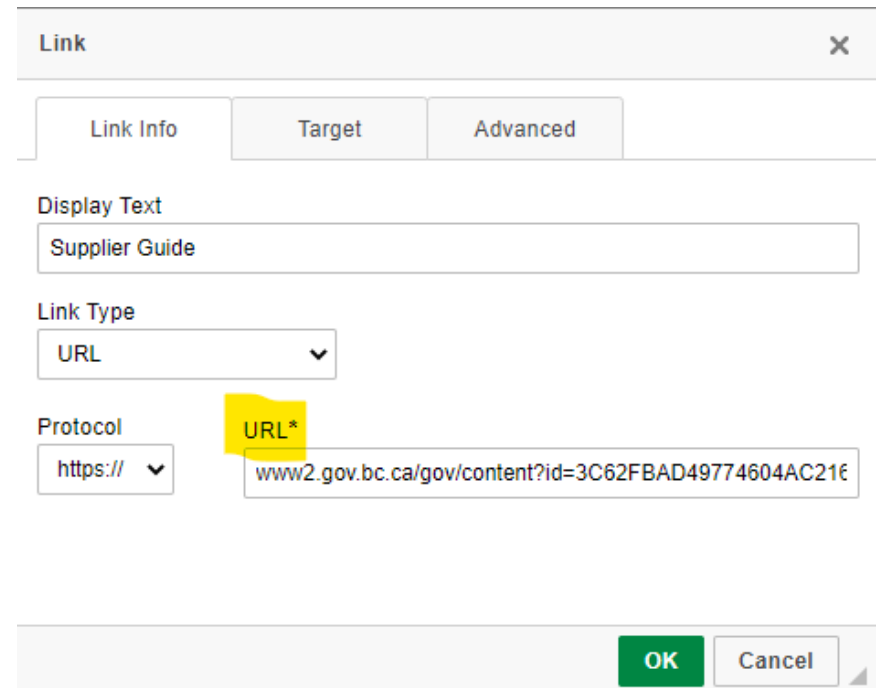
1. Copy link from web page.
2. Paste link into text field.
3. Select text link and click the link button.
4. In the dialog box, paste web address into URL field.
5. Click Ok.



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, Login, and Registration

URL: <https://bcbid.gov.bc.ca>

The screenshot shows the BC Bid Portal homepage. At the top left is the BC Bid logo (1). The main navigation menu includes 'Opportunities', 'Contract Awards', 'Unverified Bid Results', and 'Login' (2). The 'Welcome to the BC Bid Portal' message (3) provides quick links for finding opportunities, viewing awarded contracts, and unverified bid results, along with login instructions for suppliers and buyers. The 'Resources' section (4) details registration steps for suppliers and buyers (5). The 'News' section (6) features announcements about application periods and go-live dates. The 'Help Desk' section (7) provides contact information for registered users. An 'Adjust Contrast' button (8) is located in the top right corner.

1. Click the BC Bid icon at any time to return to this main page.
2. The main menu has direct links to **Opportunities, Contract Awards, Unverified Bid Results** and **Login**.
3. The Welcome box display a welcome message and quick links.
4. Suppliers see the benefits of registration and can follow links to prepare for registration, to register, login and access their Supplier Guide for navigation support.
5. Buyers can link to register login and access their navigation guides.
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](#)

Login

1. Navigate to BC Bid to see the **Login Screen**.
2. Enter your IDIR Username and Password.
3. Click **Continue**.

Buyers will be directed to the Buyer Dashboard.



[Login and How the Buyer Dashboard Works](#)

Note: If you have registered for BC Bid, and have certain permissions (eg: purchasing permissions), and then you switch organizations, ministries or roles, you will need to contact the BC Bid help desk to arrange permissions for the new role if they are needed.

Registration

The screenshot shows the 'Buyer Registration' page on the BC Bid website. At the top, there is a navigation bar with 'Opportunities', 'Contract Awards', 'Unverified Bid Results', and 'Login'. The page title is 'Buyer Registration'. Below the title, there are 'Submit' and 'Cancel' buttons. A message box states: 'Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time.' The form is divided into two sections: 'Personal Information' and 'Address'. The 'Personal Information' section includes fields for 'First name*', 'Last name*', 'Position/Title*', 'Telephone (E.g. 1-777-888-9999 ext 1234)*', and 'E-mail Address*'. The 'Address' section includes a map of the world with 'Map' and 'Satellite' options. A 'Privacy - Terms' link is visible in the bottom right corner.

There are a few situations where you may not be successful logging in:

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

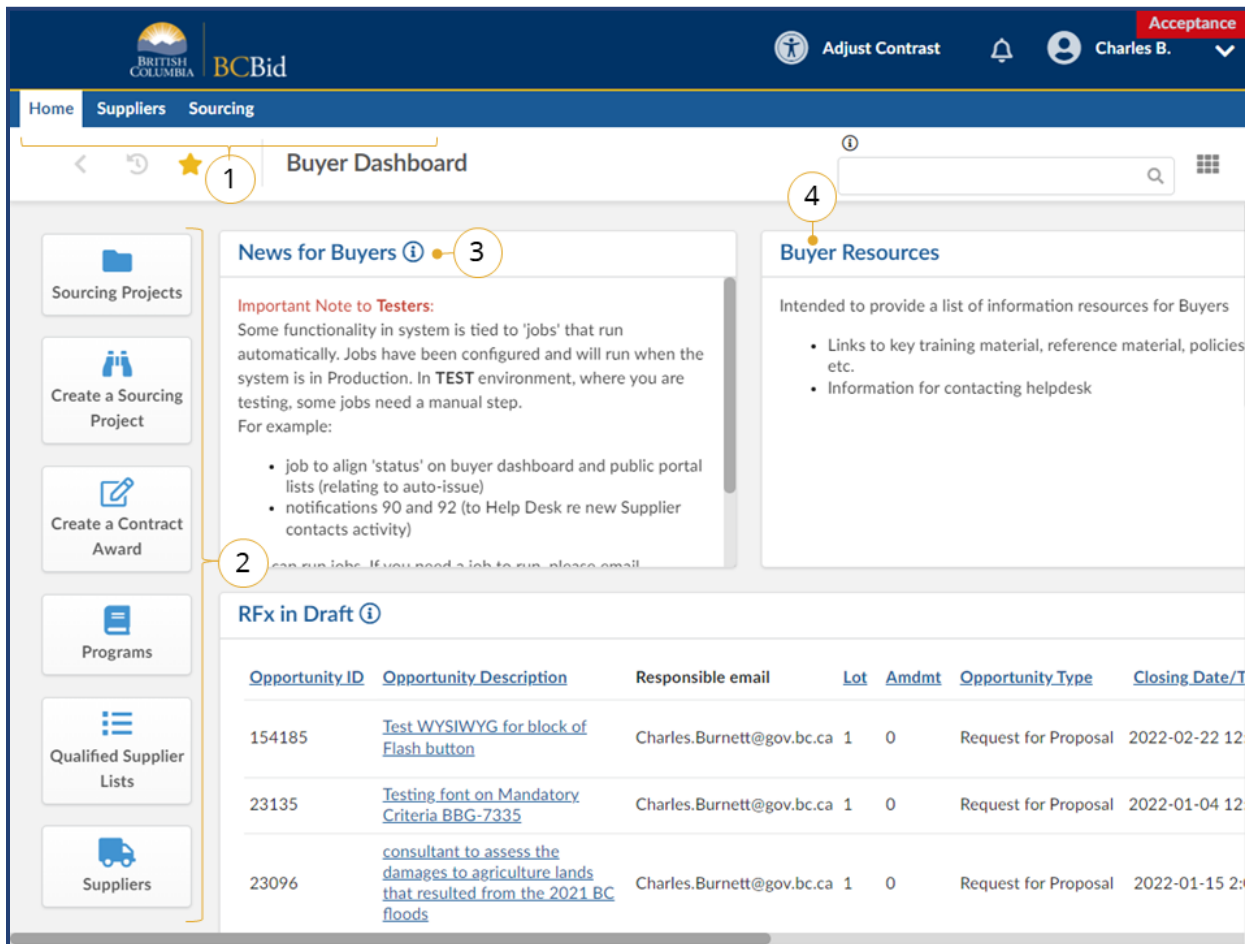
In these cases, you should first confirm that you have a functioning IDIR. Then you will need to fill out and submit the Buyer Registration Form. The BC Bid Help Desk will review your submission.

After you submit the Buyer Registration form, it may take a few days before your registration is processed and you are able to login with your IDIR to BC Bid.

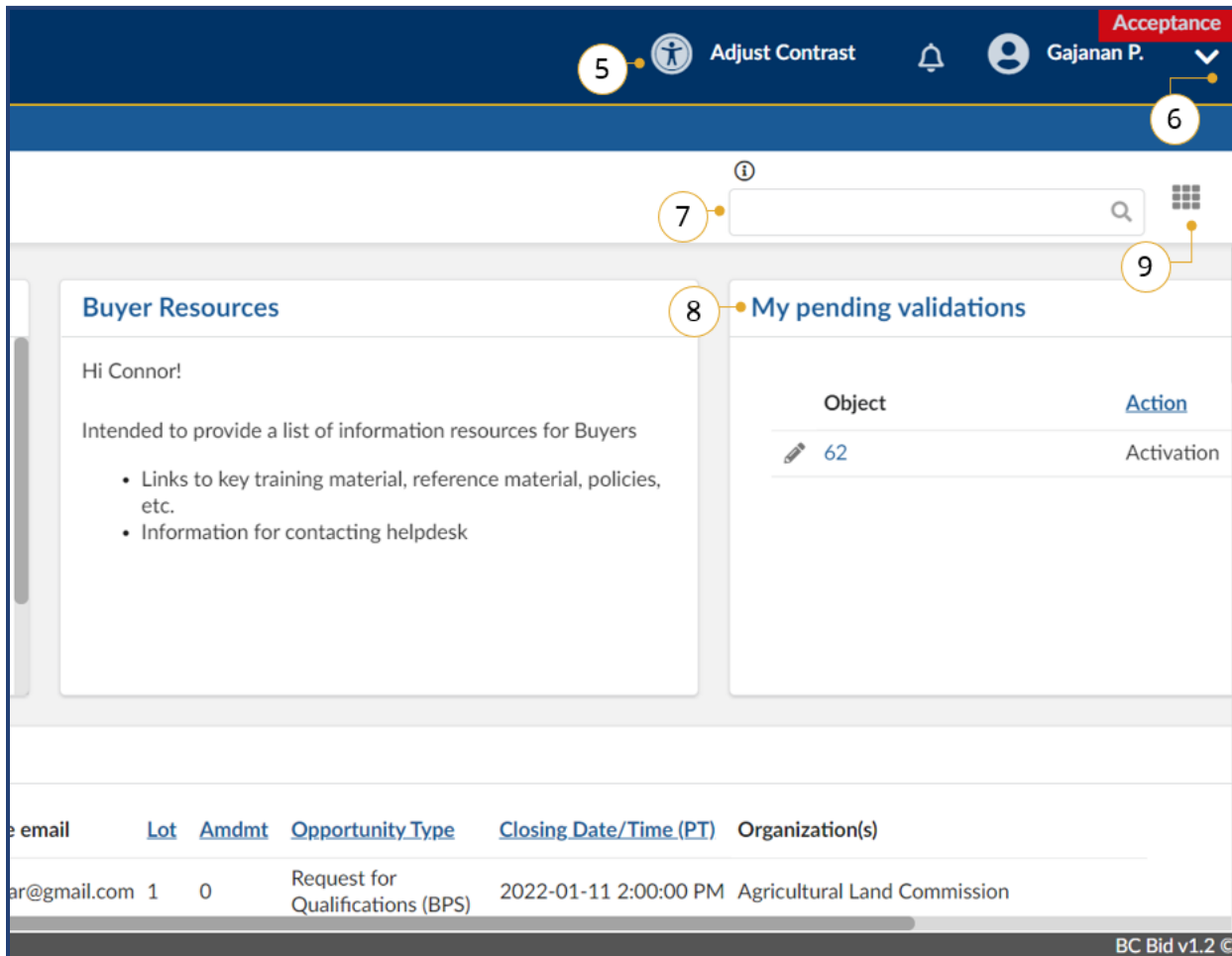
Buyer Dashboard

Home – 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. **Adjust Contrast:** Adjust your screen brightness to a darker mode or reset it to the default brightness.
6. **My Profile:** to review your profile. If adjustments are required contact Help Desk.
7. **Search** box to search for Contracts, Suppliers; or your Sourcing Projects.
8. **My Pending Validations:** Shows projects and/or RFxs where your action is required.
9. **Customize Dashboard** to move or resize widgets.

The screenshot shows the BC Bid Buyer Dashboard with the following sections:

- Project:** For example:
 - job to align 'status' on buyer dashboard and public portal lists (relating to auto-issue)
 - notifications 90 and 92 (to Help Desk re new Supplier contacts activity)
- RFX in Draft (10):**

Opportunity ID	Opportunity Description	Responsible email	Lot	Amdmt	Opportunity Type	Closing Date/Time (PT)	Organization(s)
23034	RFS	Ben.Rosche@gov.bc.ca	1	0	Request for Submissions	2021-12-28 12:00:00 AM	Ministry of Citizens'
- RFX Open (11):**

Opportunity ID	Opportunity Description	Responsible email	Lot	Amdmt	Opportunity Type	RFX Status	Closing Date/Time (PT)	Orga
23184	test	Ben.Rosche@gov.bc.ca	1	0	Contract Award Notice	Open	2022-01-26 12:00:00 AM	Mini
- RFX Closed, Not Awarded (12):**

Opportunity ID	Opportunity Description	Responsible email	Lot #	Amdmt	Opportunity Type	Closing Date/Time (PT)	Org
ON-003238	Consultant Services	Ben.Rosche@gov.bc.ca	1	1	e-Request for Proposal	2019-08-22 2:00:00 PM	Min
- RFX Completed (13):**

Opportunity ID	Opportunity Description	Responsible email	Lot #	Amdmt	Opportunity Type	Closing Date/Time (PT)	Organization(s)
20600	Community Information Tool	Ben.Rosche@gov.bc.ca	1	1	Request for Proposal	2021-11-08 1:05:15 PM	Ministry of Citizens' Service

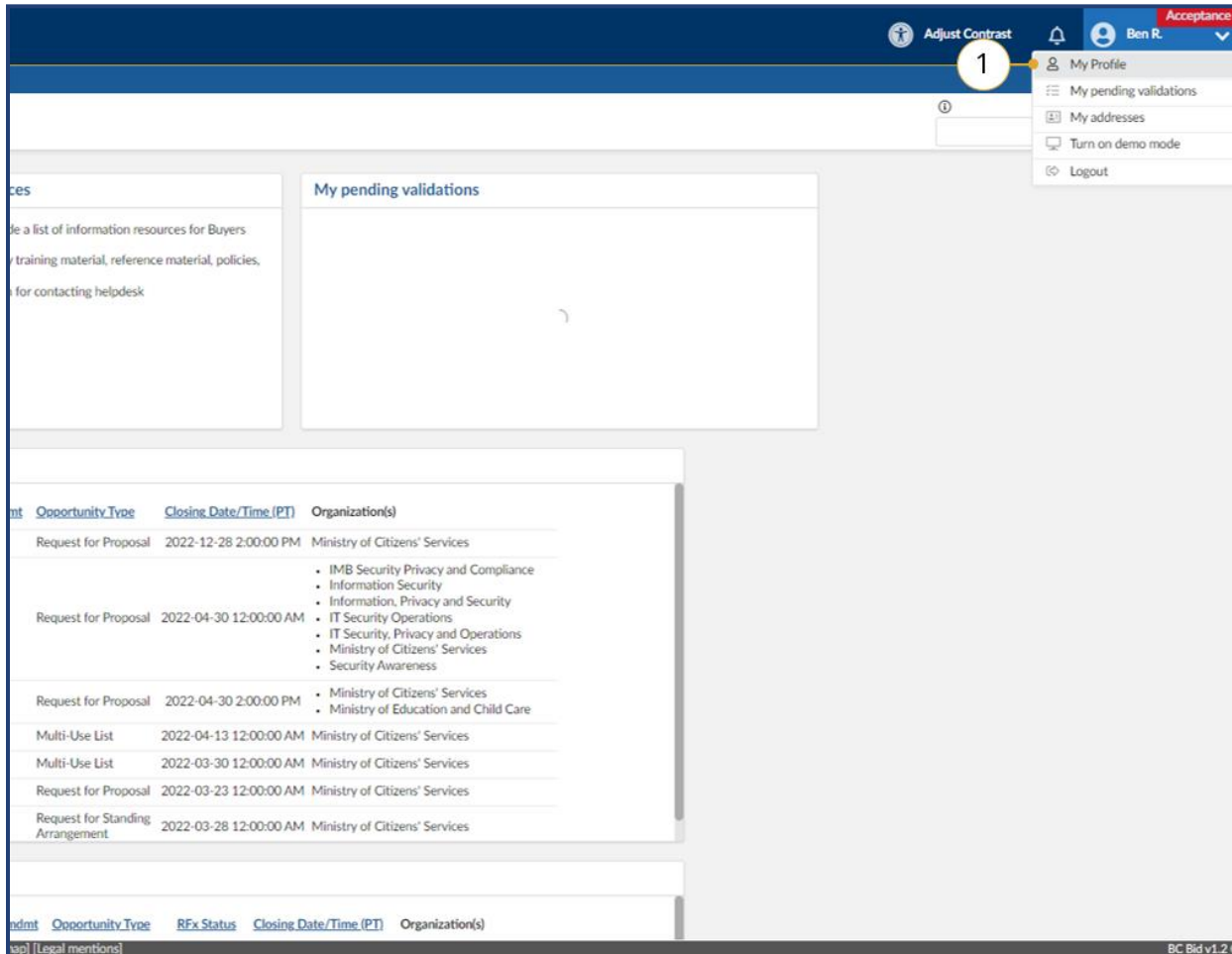
10. **RFX in Draft** Shows all draft Opportunities that the Buyer is involved in.
11. **RFX Open** Shows open projects and/or RFXs where you are a team member. These are sorted by soonest Closing Date at the top.
12. **RFX Closed, Not Awarded:** Shows closed projects and/or RFXs where you are a team member. These are sorted by oldest Closing Date at the top.
13. **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.

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.

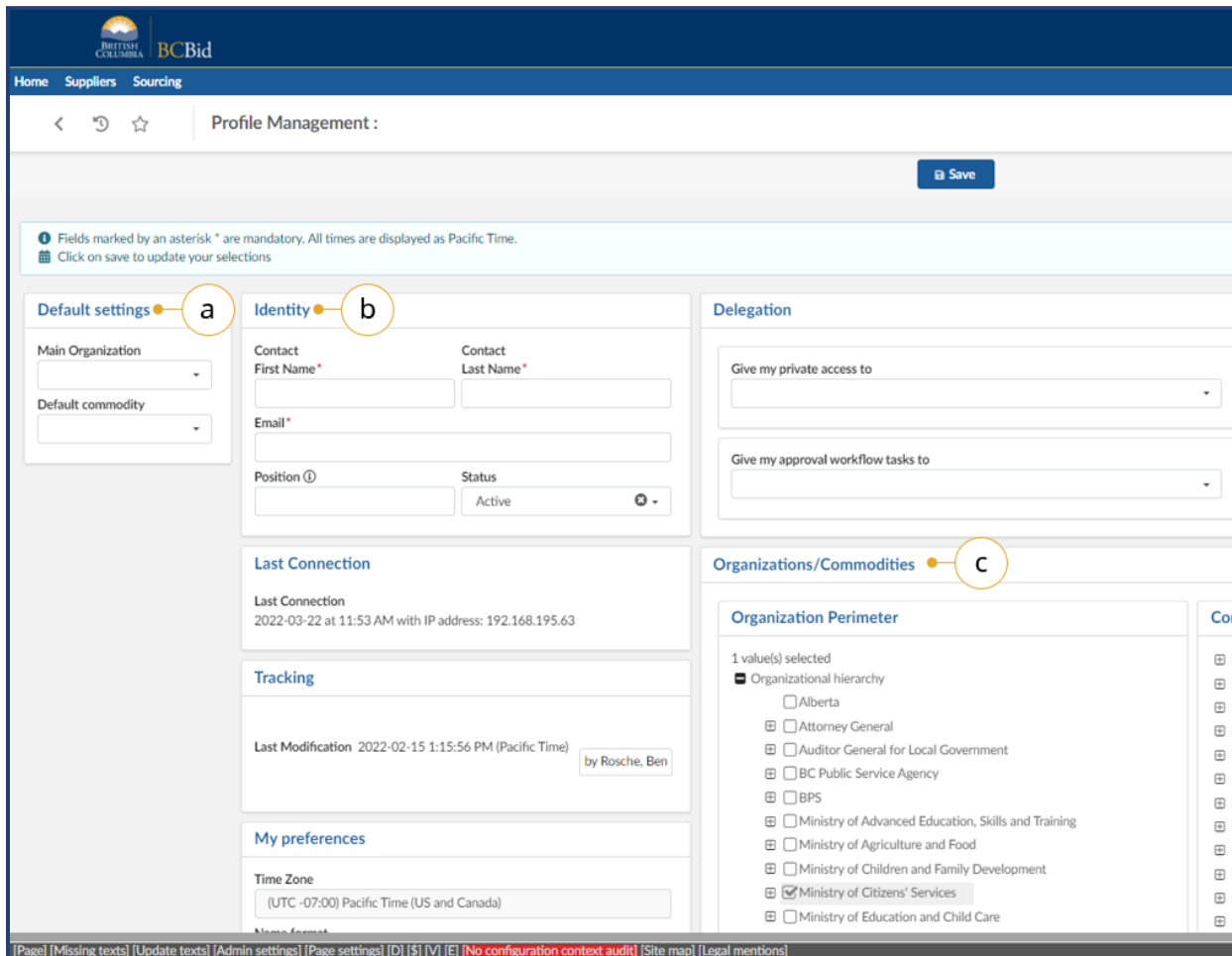
Edit My Profile



The screenshot shows the BC Bid application interface. In the top right corner, the user's name 'Ben R.' is displayed next to a dropdown arrow. A red 'Acceptance' badge is visible above the name. A yellow circle with the number '1' highlights the dropdown arrow. The dropdown menu is open, showing the following options: 'My Profile', 'My pending validations', 'My addresses', 'Turn on demo mode', and 'Logout'. Below the dropdown, the main content area is partially visible, showing a table of opportunities and a 'My pending validations' section.

Opportunity Type	Closing Date/Time (PT)	Organization(s)
Request for Proposal	2022-12-28 2:00:00 PM	Ministry of Citizens' Services
Request for Proposal	2022-04-30 12:00:00 AM	<ul style="list-style-type: none">IMB Security Privacy and ComplianceInformation SecurityInformation, Privacy and SecurityIT Security OperationsIT Security, Privacy and OperationsMinistry of Citizens' ServicesSecurity Awareness
Request for Proposal	2022-04-30 2:00:00 PM	<ul style="list-style-type: none">Ministry of Citizens' ServicesMinistry of Education and Child Care
Multi-Use List	2022-04-13 12:00:00 AM	Ministry of Citizens' Services
Multi-Use List	2022-03-30 12:00:00 AM	Ministry of Citizens' Services
Request for Proposal	2022-03-23 12:00:00 AM	Ministry of Citizens' Services
Request for Standing Arrangement	2022-03-28 12:00:00 AM	Ministry of Citizens' Services

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.

Home Suppliers Sourcing

Profile Management :

Last Modification 2022-02-15 1:15:56 PM (Pacific Time) by

My preferences

Time Zone
(UTC -07:00) Pacific Time (US and Canada)

Name format
First Name Last name

Accessibility mode

Date format
2022-03-22 3:06:10 PM

Number format
-1,234,567.89

Customized number format

Subscriptions

- 75 - RFQ Termination date approaching
- BC Bid - New Organization Created
- BCCA Error Notification
- BCCA Success Notification
- CFS ITQ Error Notification

Attorney General

Auditor General for Local Government

BC Public Service Agency

BPS

Ministry of Advanced Education, Skills and Training

Ministry of Agriculture and Food

Ministry of Children and Family Development

Ministry of Citizens' Services

Ministry of Education and Child Care

Ministry of Energy, Mines and Low Carbon Innovation

Ministry of Environment and Climate Change Strategy

Ministry of Finance

Ministry of Forests

Ministry of Health

Ministry of Indigenous Relations and Reconciliation

Ministry of Jobs, Economic Recovery and Innovation

Ministry of Labour

Ministry of Land, Water and Resource Stewardship

Ministry of Mental Health and Addictions

Ministry of Municipal Affairs

Ministry of Public Safety and Solicitor General and Emergency BC

Ministry of Social Development and Poverty Reduction

Ministry of Tourism, Arts and Culture

Ministry of Transportation and Infrastructure

Office of the Auditor General

Office of the BC Human Rights Commission

Office of the Information and Privacy Commissioner

Office of the Merit Commissioner

Office of the Ombudsperson

Office of the Police Complaint Commissioner

Office of the Registrar and Cabinet Office

[Save](#)

https://envalt.valua.ca/buyer/ssbc/rctevol/4nxe/page.aspx/en/usr/account_manage# [No configuration context audit](#) [Site map] [Legal mentions]

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

Explore Sourcing Projects

The screenshot shows the BC Bid system interface. The top navigation bar includes 'Home (Admin)', 'Home', 'Suppliers', 'Sourcing', 'Analytics', 'Admin', 'Config', and 'Integration'. The 'Sourcing' menu is expanded, showing options like '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' is placed over the 'Sourcing Projects' menu item. The main content area shows a table of 'RFx in Draft' with columns for Opportunity ID, Opportunity Description, Responsible email, Lot, Amdmt, Opportunity Type, Closing Date/Time (PT), and Organi.

Opportunity ID	Opportunity Description	Responsible email	Lot	Amdmt	Opportunity Type	Closing Date/Time (PT)	Organi
1000	[Master] Skills Training and Employment Program	Ben.Rosche@gov.bc.ca	1	0	Multiuse List Request for Qualification	2021-11-30 12:00:00 AM	Min and Min
20550	Cedar Licenses	Ben.Rosche@gov.bc.ca	1	0	Timber Auction	2021-11-30 12:00:00 AM	Ministr
20516	RFP for Comparison	Ben.Rosche@gov.bc.ca	1	0	Request for Proposal	2021-12-15 12:00:00 AM	Ministr
16656	Pending Val	Courtney.DunsmoorFarley@gov.bc.ca	2	0	Request for Information	2021-10-28 12:00:00 AM	Ministr
14330	For Definitions	Ben.Rosche@gov.bc.ca	1	0	e-Request for Proposal	2021-11-24 2:00:00 AM	Ministr
16663	Definition Review	Ben.Rosche@gov.bc.ca	1	0	e-Request for Proposal	2021-11-26 2:00:00 AM	Ministr
12869	Test	Ben.Rosche@gov.bc.ca	1	0	Sprint with Us	2021-09-29 2:00:00 PM	Ministr

1. In the Quick Access menu, click **Sourcing Projects** or click **Sourcing** in the main menu, then click **Sourcing Projects**.



[Exploring Opportunities](#)



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.

The screenshot shows the 'Sourcing Projects' page in the BC Bid system. At the top, there are navigation tabs for 'Home', 'Suppliers', and 'Sourcing'. Below this is a search filter section with fields for 'Search by keyword', 'Commodity', 'Sourcing Project Type', and 'Status'. There are also checkboxes for 'Limit to my scope' and 'Include Historical'. A 'Search' button (labeled 'a') and a 'Reset' button (labeled 'b') are located to the right of the search fields. Below the search section is a 'Create Project' button (labeled '5'). The main part of the page is a table of sourcing projects with columns for 'Label', 'Opportunity ID', 'Code', 'Project Type', 'Opportunity Type', 'RFx Status', and 'Commodity'. The first row is labeled 'Opportunity' (labeled '4'). The second row is 'Cedar Licenses'. The third row is 'Joyce testing' (labeled '3'). The fourth row is 'Community Information Tool'. The fifth row is 'RFP for Comparison'. The sixth row is 'Test'. The seventh row is '[Master] Skills Training and Employment Program'. At the bottom of the page, there is a footer with links for 'Missing texts', 'Update texts', 'ID', '\$', 'V', 'E', 'No configuration context audit', 'Site map', and 'Legal mentions'.

Label	Opportunity ID	Code	Project Type	Opportunity Type	RFx Status	Commodity
Opportunity		BPM016967	Strategic (Multistage)			Live Plant and Animal Material and Accessories and Supplies
Cedar Licenses	20550	BPM016959	Timber Auction	Timber Auction	Draft	Cedar or cedro colorado tree
Joyce testing		BPM016955	Strategic (Multistage)			Computer data storage management systems
Community Information Tool	• 20542 • 20542	BPM016953	Strategic (Multistage)	• Request for Proposal • Request for Proposal • Request for Proposal	• Closed • Completed • Draft	Research programs
RFP for Comparison	20516	BPM016935	Strategic (Multistage)	Request for Proposal	Draft	Mineral and Textile and Inedible Animal Materials
Test	17839	BPM014265	Strategic (Multistage)	e-Request for Proposal	Draft	Fisheries and aquaculture
[Master] Skills Training and Employment Program	1000	BPM013874	Multiuse List Request for Qualification	Multiuse List Request for Qualification	Draft	Education and Training Services

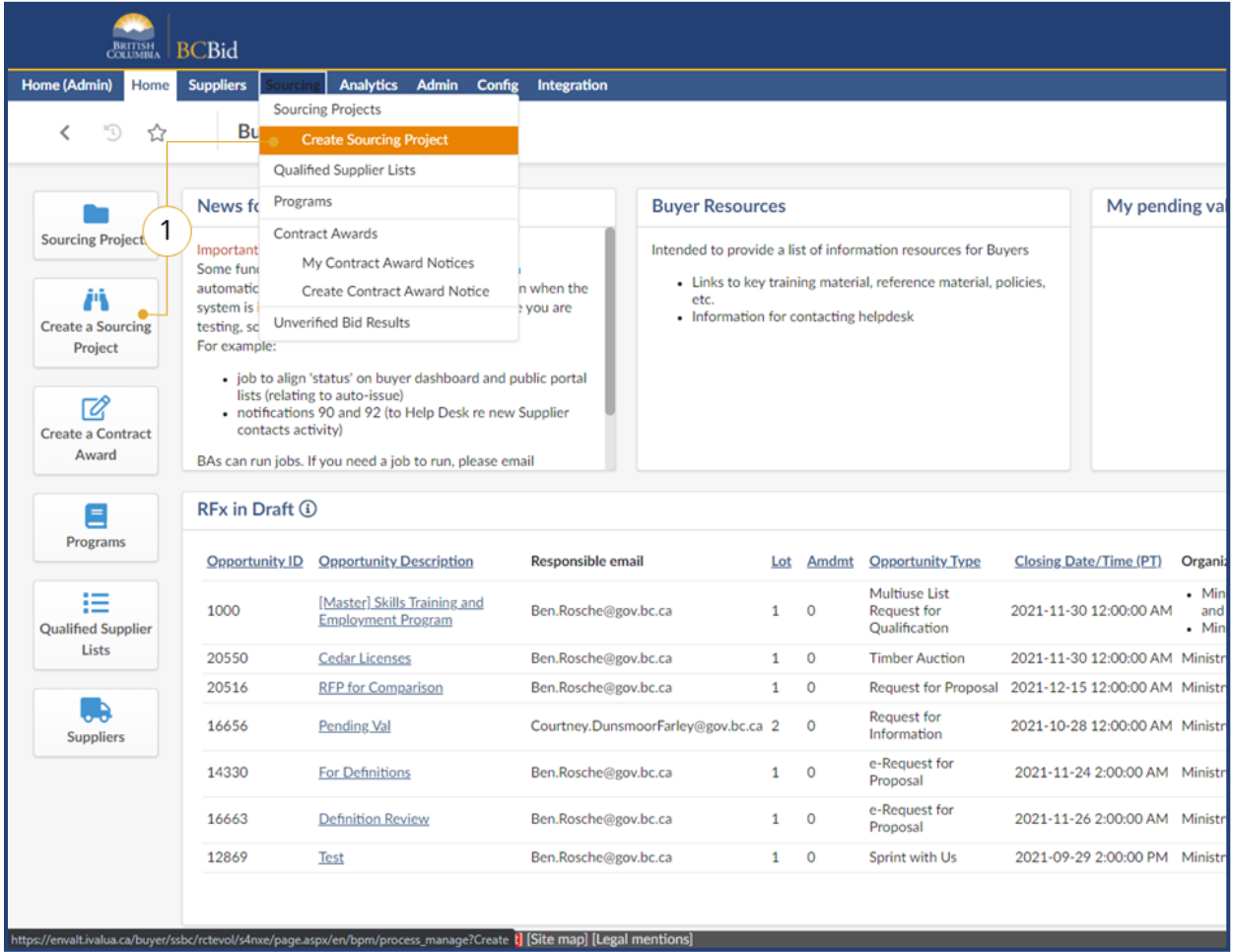
2. In one or multiple searchable fields, enter text or use the drop-down lists to filter the search options.
 - a. Click **Search**.
 - b. To start a new search, click **Reset**.
3. To read-only, click the **Label** or **Code** of the Sourcing Project.
4. To edit opportunities click the **pencil** icon to edit the Sourcing Project.
5. To create a new sourcing project, click **Create Project**.

The General Information form will display.

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.

Step 1 - Create a Sourcing Project



1. In the Quick Access menu, click **Create Sourcing Project** or in the main menu click **Sourcing** and then **Create Sourcing Project**.



[How to Create a Sourcing Project](#)



Buyers are unable to use team member names to narrow the scope of the Sourcing Project search.

General Information Form

The selection of Sourcing Project Type determines the available Opportunity Types within the Sourcing Project. Some Opportunity Types are not available to all ministries. Furthermore, some Opportunity Types have sealed Submissions, which prevents Buyers from viewing Submissions prior to the Closing Date & Time of the Opportunity.

Sourcing Project Types	Opportunity Types	All Ministries?	Sealed Submissions?
Strategic (Multistage)	Invitation to Quote (ITQ)	No	Yes
	Request for Information (RFI)	Yes	No
	Single Use Request for Qualifications (SURFQ)	Yes	Yes
	Request for Proposal (RFP)	Yes	Yes
	Request for Standing Arrangement (RSA)	No	No
	Request for Submission (RFS)	No	No
	Request for Corporate Standing Arrangement (RCSA)	No	Yes
	Negotiated Procurement	No	Yes
	Other Procurement Type	No	Yes
Multi-use List	Multi-use List	Yes	No
Timber Auction	Timber Auction	No	Yes
Notice to Vendors	Notice to Vendors (NTV)	Yes	No
Limited Tendering (NOI/CAN)	Notice of Intent (NOI) to Contract Award Notice (CAN)	Yes	No

Home Suppliers Sourcing

Create Sourcing Project

Save

Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time.
Click on save to update your selections

Set up Project

General Information

Code a

Is a template

Sourcing Project Type* a

Status* In progress b

Opportunity Description* c Confidential Sourcing Project

Date Created* 2021-11-04 b

Issued By* d

Issued For e

Main Commodity* Program e

Other Commodities

[Page] [Missing texts] [Update texts] [D] [\$] [V] [E] [No configuration context audit] [Site map] [Legal mentions]

1. In the General Information Form
 - a. In the **Sourcing Project Type** drop-down list, select the appropriate Sourcing Project Type.
 - b. In the **Opportunity Description** text box, enter a title for the opportunity.
 - c. If a Buyer needs to run a **Confidential Sourcing Project** they must contact BC Bid Helpdesk to set up the Opportunity.
 - d. From the **Issued By** drop-down list, select the appropriate Organization.
 - e. *Optional:* If posting on behalf of another Organization, select the Organization in the **Issued For** drop-down list. To see more options, click **See All**.

- f. In the **Main Commodity** drop-down list, select the appropriate code at the appropriate tier, based on the purchase.
- g. *Optional:* Use the **Other Commodities** drop-down list to select the appropriate commodities at the appropriate tier, based on the purchase. If a more detailed search is require, select See All.
- h. *Optional:* Select a **Program** from the drop-down list. Selecting a Program will provide access to any approved documentation associated with the selected program and create a link to the Sourcing Project being developed.
- i. Click **Save**.



[Commodity Codes](#)



The Issued by and Issued for fields cannot have the same value as each other. If using Issued for field, select the branch or division at a different level than what is selected in Issued by.

Multi-use List General Information Form

- j. If the resulting Qualified Supplier List (QSL) can be accessed by all other ministry organizations, select **Yes**.
- k. If **No** is selected, then use the **Available only to these organizations** drop-down list to select the ministry organizations that can access the resulting QSL. If no other ministry organization can access the QSL, then select your ministry or the specific division/branch that is allowed to use the list.

Note: If more than 5 organizations are listed, click the double arrow to view all.

- l. Click **Save**.



[How to create a MUL](#)



Users must seek legal advice to establish if they have the authority to create QSLs for other ministries. This must be done prior to selecting the **Yes** radio button for **Do you want all other ministries to have access to the RFQ list?**

Set up Project

Home Suppliers Sourcing

Sourcing project: BPM017004 - Community Information Tool - Set up Project

Save

Set up Project 1

Set up Team

Discussion Forum

Set up Documents

Add Suppliers

Prepare RFX

View RFX activity

Interested Supplier List

Analyze & Award

Notify & Share

Copy Sourcing

Copy sourcing ①

To copy RFX tabs from an existing Sourcing project, choose a project using the selector above and click the Save button. Note: the copy will only occur when the Sourcing project has no RFX

General Information

Code
BPM017004 Is a template

Sourcing Project Type* Status*

Opportunity Description* Date Created ①*

Confidential Sourcing Project

Issued By*

Issued For

Main Commodity* Program ①

Other Commodities

[Page] [Missing texts] [Update texts] [D] [\$] [V] [E] [No configuration context audit] [Site map] [Legal mentions]

1. In the **Set Up Project** menu, review the information entered after selecting Create Sourcing Project and make changes, if necessary.
2. *Optional:* Select the two left-facing arrows to expand or collapse the left-hand navigation pane.



The **Sourcing Project Type** can be changed at any point prior to selecting an **Opportunity Type** on the **Prepare RFX – Setup** tab.

Copy Sourcing

BCBid

Home Suppliers Sourcing

Sourcing project: BPM017004 - Community Information Tool - Set up Project

Save

Set up Project

Set up Team

Discussion Forum

Set up Documents

Add Suppliers

Prepare RFx

View RFx activity

Interested Supplier List

Analyze & Award

Notify & Share

Copy Sourcing

Copy sourcing ⓘ

1

To copy RFx tabs from an existing Sourcing project, choose a project using the selector above and click the Save button.
Note: the copy will only occur when the Sourcing project has no RFx

General Information

Code
BPM017004 Is a template

Sourcing Project Type* Status*
Strategic (Multistage) In progress

Opportunity Description* Date Created ⓘ*
Community Information Tool 2021-11-08

Confidential Sourcing Project

Issued By*
Ministry of Citizens' Services

Issued For

Main Commodity* Program ⓘ
81112000 - Data services

Other Commodities

[Page] [Missing texts] [Update texts] [D] [\$] [V] [E] [No configuration context audit] [Site map] [Legal mentions]

1. In the **Set up Project** tab, select a previously created Opportunity from the **Copy sourcing** drop-down list.

Note: Copy sourcing duplicates all data from a previous Opportunity except for the Opportunity ID and Opportunity Description fields. . Some information will only display after the buyer clicks 'Save' on the Prepare RFx. In this scenario, you can only change the Opportunity Type prior to Validate & Save.



[Copy Sourcing and Status](#)



Note that not all Buyers will see the **Copy sourcing** function.

Set up Team

The screenshot shows the BCBid web application interface for setting up a team for a sourcing project. The left-hand navigation menu is visible, with 'Set up Team' highlighted and a circled '1' next to it. The main content area is titled 'Set up Team' and features a 'Save' button. Below the title, there is a 'Team' section with the following roles and descriptions:

- Official Contact:** is the single contact that suppliers can communicate with about the opportunity. Messages from Suppliers will be received within the Discussion Forum. Email notifications sent to suppliers use the Official Contact (name and email). This role is set by default to the creator of the sourcing project but can be changed.
- Responsible:** has full access to update the sourcing project and can unseal a Submission.
- Contributor:** has access to edit the sourcing project, including creating offline Submissions (does not have access to update the set up team tab, unseal a Submission).
- Read-only:** has access to view the sourcing project and can leave comments.

Below the roles, there is a 'Select user(s)*' dropdown menu. At the bottom of the form, there are two sections: 'Decision By' and 'Profiles'. The 'Decision By' section shows 'Ben.Rosche@gov.bc.ca' and the 'Profiles' section shows 'Official Contact' and 'Responsible'.

1. In the left-hand menu, click **Set Up Team** to add team members and assign roles for the project.



[Set up Team](#)



Assigning users to a team can only be done by the user with the Responsible role. The creator of the Sourcing Project is the Responsible by default. This can be changed.

Adding Users

The screenshot shows the BCBid Sourcing project setup page for 'Sourcing project: BPM017004 - Community Information Tool - Set up Team'. The page has 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 main content area is titled 'Set up Team' and contains a 'Team' section with roles and their descriptions: 'Official Contact', 'Responsible', 'Contributor', and 'Read-only'. Below this is a 'Select user(s)*' dropdown menu. The dropdown is open, showing a list of users: ADMIN Amanda, ADMIN CA, ADMIN CharlesAdmin, ADMIN Clarity, ADMIN CourtneyAdmin, ADMIN FR, ADMIN James, ADMIN Jason, ADMIN U.S., and ADMIN Vivek. A 'See All' link is at the bottom of the dropdown. A 'Save' button is visible in the top right corner. Two callouts, 'a' and 'b', are present: 'a' points to the dropdown arrow, and 'b' points to the 'See All' link.

1. To add users to a sourcing team:
 - a. In the **Select user(s)** drop-down list, enter the username and select the user to add to the team.
 - b. In the **Select user(s)** drop-down list, click **See all** to search using Browse Users.



It is advised that the Buyer adds users to the team through the process of selecting **See All** to ensure that the correct user is selected.

ct: d Browse Users

Search by keyword Filter by profile

Type
Internal contact

BCeID

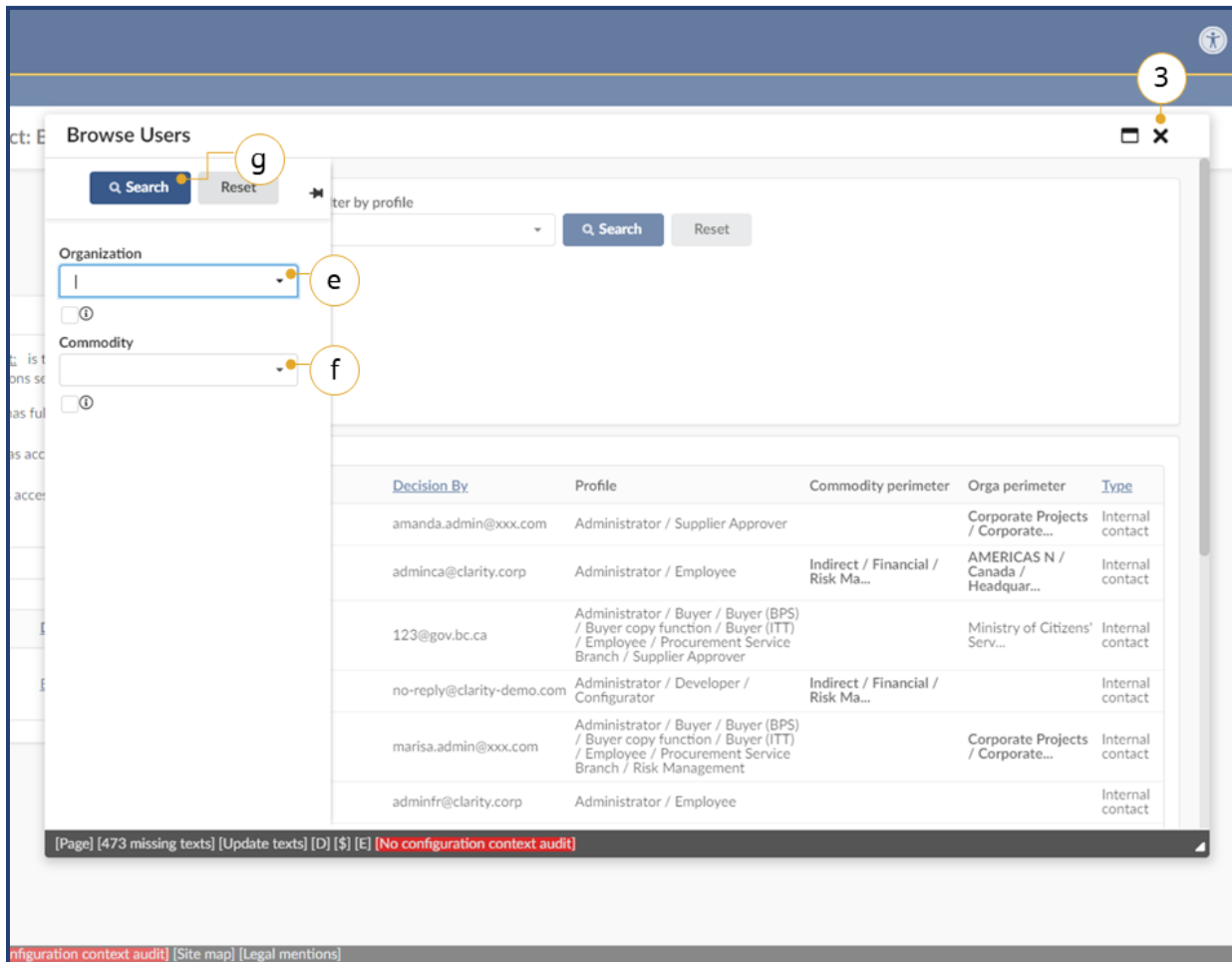
Filters Type: Internal contact

<input type="checkbox"/> Add	User	BCeID	Decision By	Profile	Commodity perimeter	Orga perimeter	Type
<input checked="" type="checkbox"/>	Admin Amanda	amanda.admin@xxx.com		Administrator / Supplier Approver		Corporate Projects / Corporate...	Internal contact
<input type="checkbox"/>	Admin CA	adminca@clarity.corp		Administrator / Employee	Indirect / Financial / Risk Ma...	AMERICAS N / Canada / Headquar...	Internal contact
<input type="checkbox"/>	Admin CharlesAdmin	123@gov.bc.ca		Administrator / Buyer / Buyer (BPS) / Buyer copy function / Buyer (ITT) / Employee / Procurement Service Branch / Supplier Approver		Ministry of Citizens' Serv...	Internal contact
<input type="checkbox"/>	Admin Clarity	no-reply@clarity-demo.com		Administrator / Developer / Configurator	Indirect / Financial / Risk Ma...		Internal contact
<input type="checkbox"/>	Admin CourtneyAdmin	marisa.admin@xxx.com		Administrator / Buyer / Buyer (BPS) / Buyer copy function / Buyer (ITT) / Employee / Procurement Service Branch / Risk Management		Corporate Projects / Corporate...	Internal contact
<input type="checkbox"/>	Admin FR	adminfr@clarity.corp		Administrator / Employee			Internal contact

[Page] [473 missing texts] [Update texts] [D] [\$] [E] [No configuration context audit]

configuration context audit [Site map] [Legal mentions]

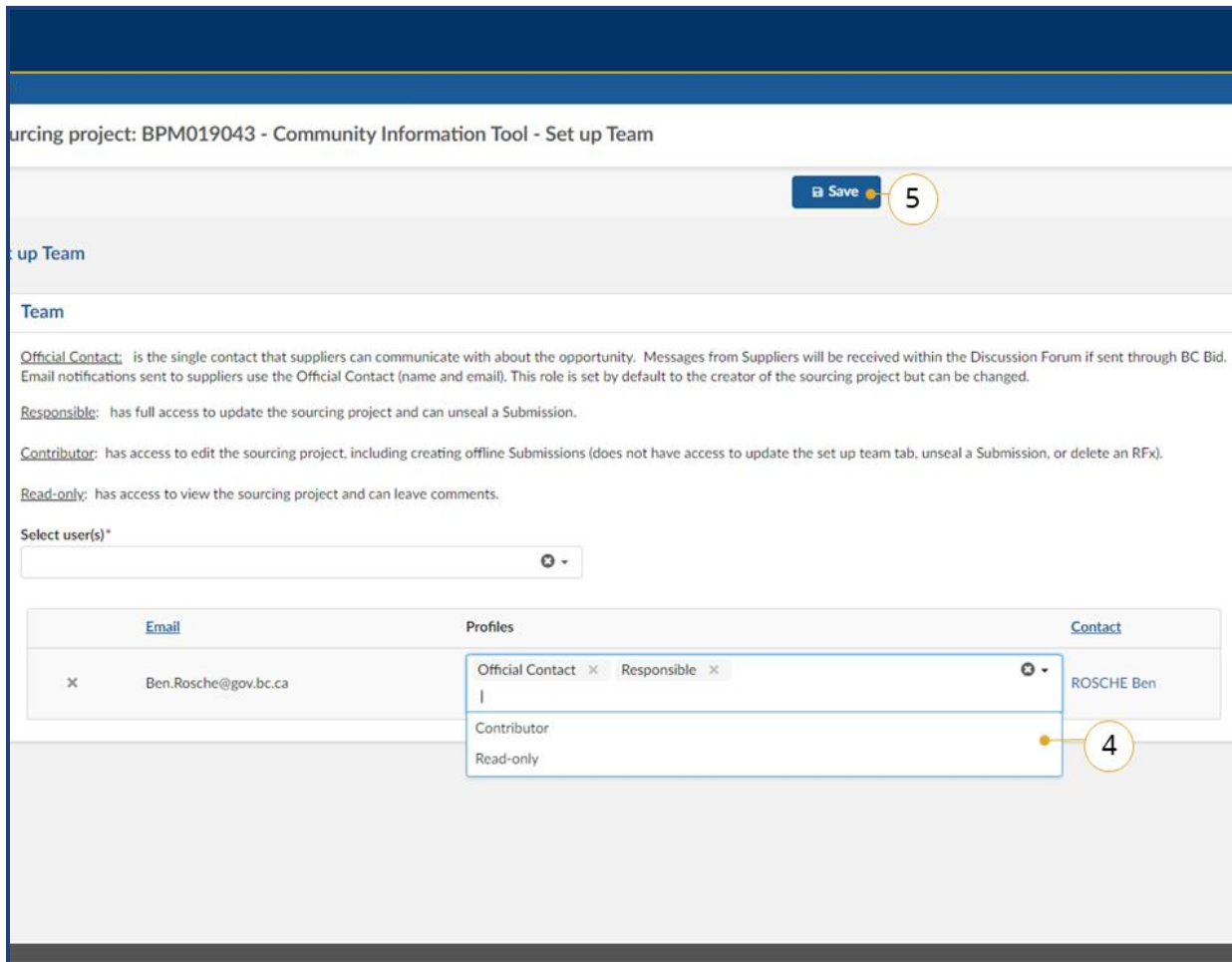
2. In the Browse Users window use **Search by keyword** to find a user.
 - a. Select a profile type in the **Filter by profile** to narrow the search.
 - b. Click **Search**.
 - c. Select the **checkbox** in the **Add** column, for the required Users.
 - d. *Optional:* Click the **pin** button to open the advanced filter.



- e. *Optional:* Click the **Organization** drop-down list to filter users by organization.
 - f. *Optional:* Click the **Commodity** drop-down list to filter users by commodity.
 - g. Click **Search**.
 - h. Repeat steps 2(a) through 2(g) as required.
3. Click **X** to close the window. There is no Save or Validate & Save for this window.



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



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

Note: 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.

Note: There can only be 1 Responsible profile and 1 Official Contact profile assigned. The Official Contact does not have to be the same user as the Responsible profile.

Note: When adding or removing profiles (as per step 4), the page will update with the change in the set up teams tab, but the change has not actually been saved yet. You must still click the save button (Step 5) to finalize the change, otherwise it will revert, and the updated profile will not save.

Remove a User or Profile

The screenshot shows the 'Set up Team' page for a sourcing project. The page includes a sidebar with navigation options like 'Set up Project', 'Set up Team', 'Discussion Forum', and 'Add Suppliers'. The main content area is titled 'Set up Team' and contains a 'Team' section with roles: 'Official Contact', 'Responsible', 'Contributor', and 'Read-only'. Below the roles is a 'Select user(s)*' dropdown menu. At the bottom, there are 'Decision By' and 'Profiles' sections. The 'Decision By' section shows a user 'Delete ROSCHE Ben' with an 'X' icon next to it, circled with a '2'. The 'Profiles' section shows 'Official Contact' and 'Responsible' roles with 'X' icons next to them, circled with a '1'. A 'Save' button is located at the top right of the main content area, circled with a '4'. A dropdown menu icon next to the 'Select user(s)*' field is circled with a '3'.

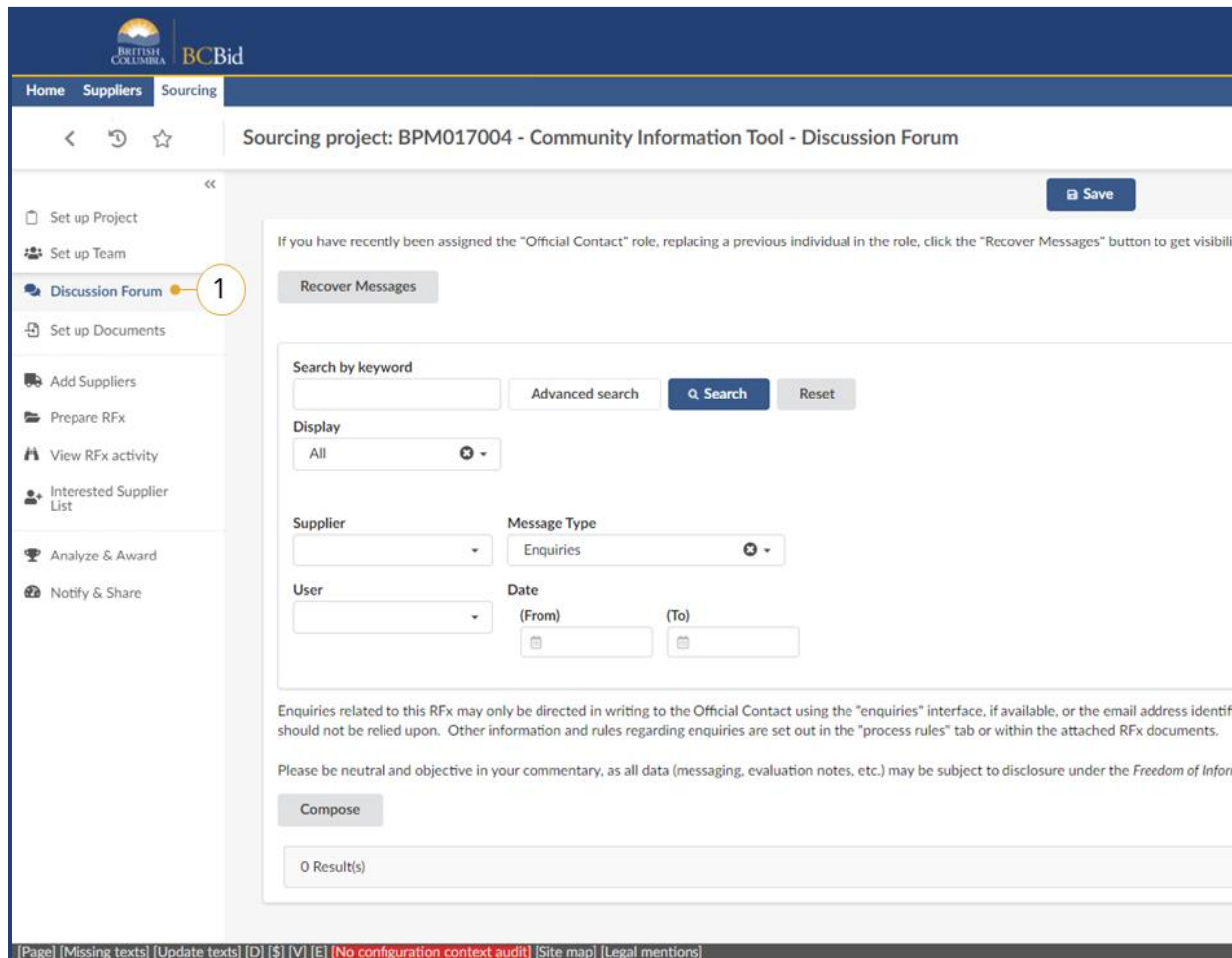
1. Click the **X** beside a profile to remove that profile for that specific user.
2. Click the **X** beside a Contact email to remove that user from the team.
3. Click the **X** in the **Select user(s)** dropdown to remove the entire team.
4. Click **Save**.



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 themselves, someone from the sourcing projects organization should contact the BC Bid Help Desk for assistance.

Discussion Forum

The Discussion Forum allows Sourcing Project teams to keep relevant collaborative discussions in one place for records management. The Official Contact can also communicate with Suppliers, as appropriate, for example issuing Addenda.



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



[How to use Discussion Forum](#)

Note: There is no ability to reply directly to other users communications. This is an intentional design to mitigate the risk of sending out potentially sensitive information to all interested suppliers. Best practice is to reformulate the questions and send it out as a separate addenda.

Creating a New Message

The screenshot shows the BCBid Sourcing project interface for project BPM017004. The left sidebar contains navigation options: Set up Project, Set up Team, Discussion Forum, Set up Documents, Add Suppliers, Prepare RFX, View RFX activity, Interested Supplier List, Analyze & Award, and Notify & Share. The main content area is titled 'Sourcing project: BPM017004 - Community Information Tool - Discussion Forum' and includes a 'Save' button. Below this is a search section with a 'Recover Messages' button, a 'Search by keyword' input field, and buttons for 'Advanced search', 'Search', and 'Reset'. There are also dropdown menus for 'Display' (set to 'All'), 'Supplier', 'Message Type' (set to 'Enquiries'), and 'User'. A 'Date' section has '(From)' and '(To)' input fields. A disclaimer states: 'Enquiries related to this RFX may only be directed in writing to the Official Contact using the "enquiries" interface, if available, or the email address identified in the "opportunity details" tab. Information obtained from any other source is not official and should not be relied upon. Other information and rules regarding enquiries are set out in the "process rules" tab or within the attached RFX documents. Please be neutral and objective in your commentary, as all data (messaging, evaluation notes, etc.) may be subject to disclosure under the Freedom of Information and Protection of Privacy Act.' At the bottom, a 'Compose' button is highlighted with a circled '1', and a 'Message History' button is visible to its right. The bottom status bar contains: '[Page] [Missing texts] [Update texts] [D] [\$] [V] [E] [No configuration context audit] [Site map] [Legal mentions]'

1. Click **Compose**.

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

Adjust Contrast | Ben R. | Acceptance

ty Information Tool - Discussi...

Save

Reset

Message Type*
Enquiries Send me a copy

Rosche Ben

To

Recipients* External Emails

Subject*

Send Cancel

Click or Drag to add files

Message History

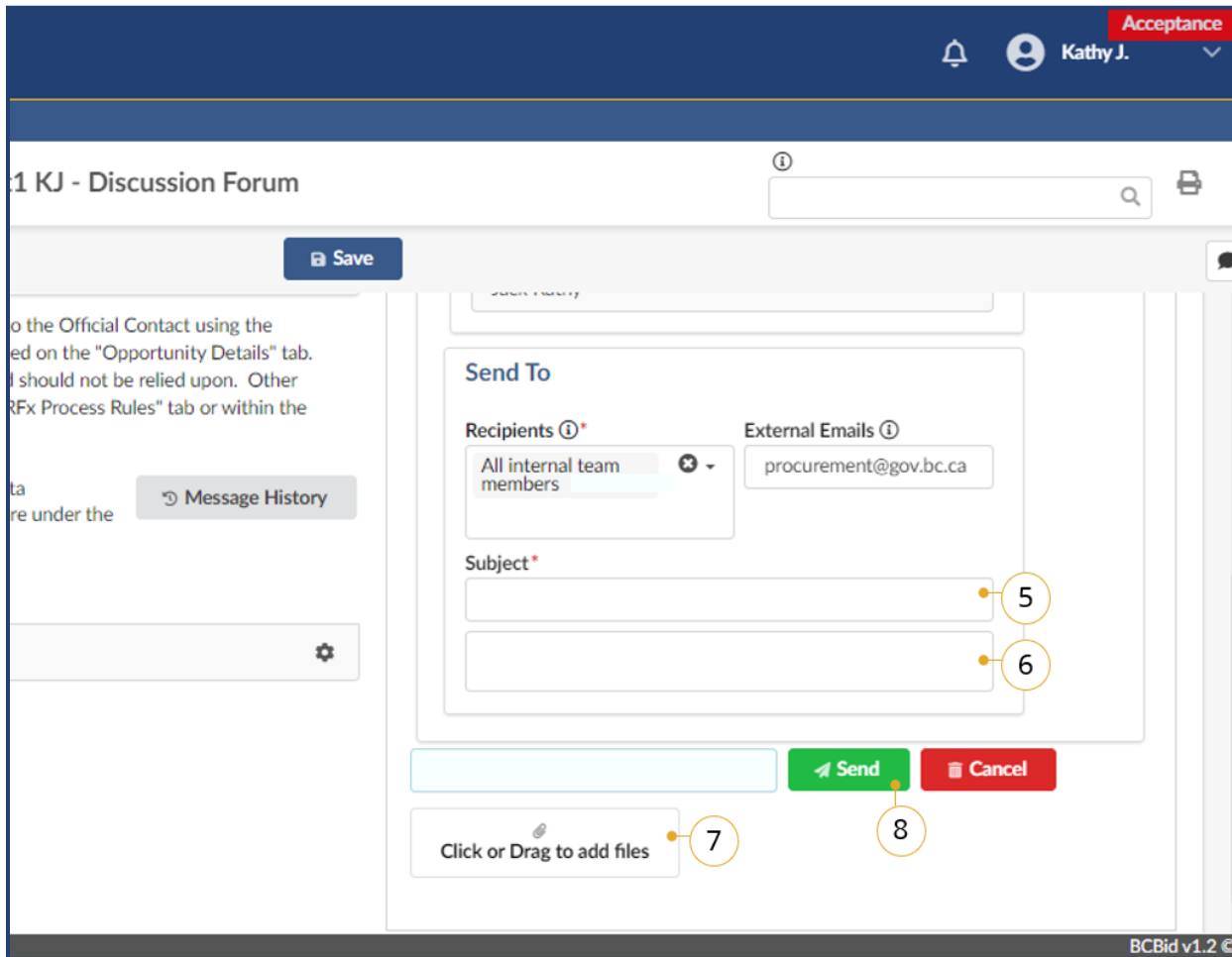
(Pacific Time)	Original sender	Last sender
08 12:40:51 PM	Ben ROSCHE	Ben ROSCHE
08 12:38:26 PM	Ally ACORN (Company A Corp)	Ally ACORN (Company A Corp)

BC Bid v1.2

2. *Optional:* Select the **Send me a copy** checkbox to receive a copy of the email.
3. 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 step. Recipients are grouped by role.
4. You can send your message to external email addresses by entering the addresses (separated by semi-colons) in the **External Emails** field. Note that the Recipients field must be populated to use this field.



Messages emailed by the application (Discussion Form) do not contain attachments. Suppliers (and Buyer team members) need to sign into the application to retrieve attachments. It is recommended that if the buyer attaches files to a message that they make a note in the message text that attachments are available. Buyers should encourage suppliers (or buyers) to register for a BC Bid account.

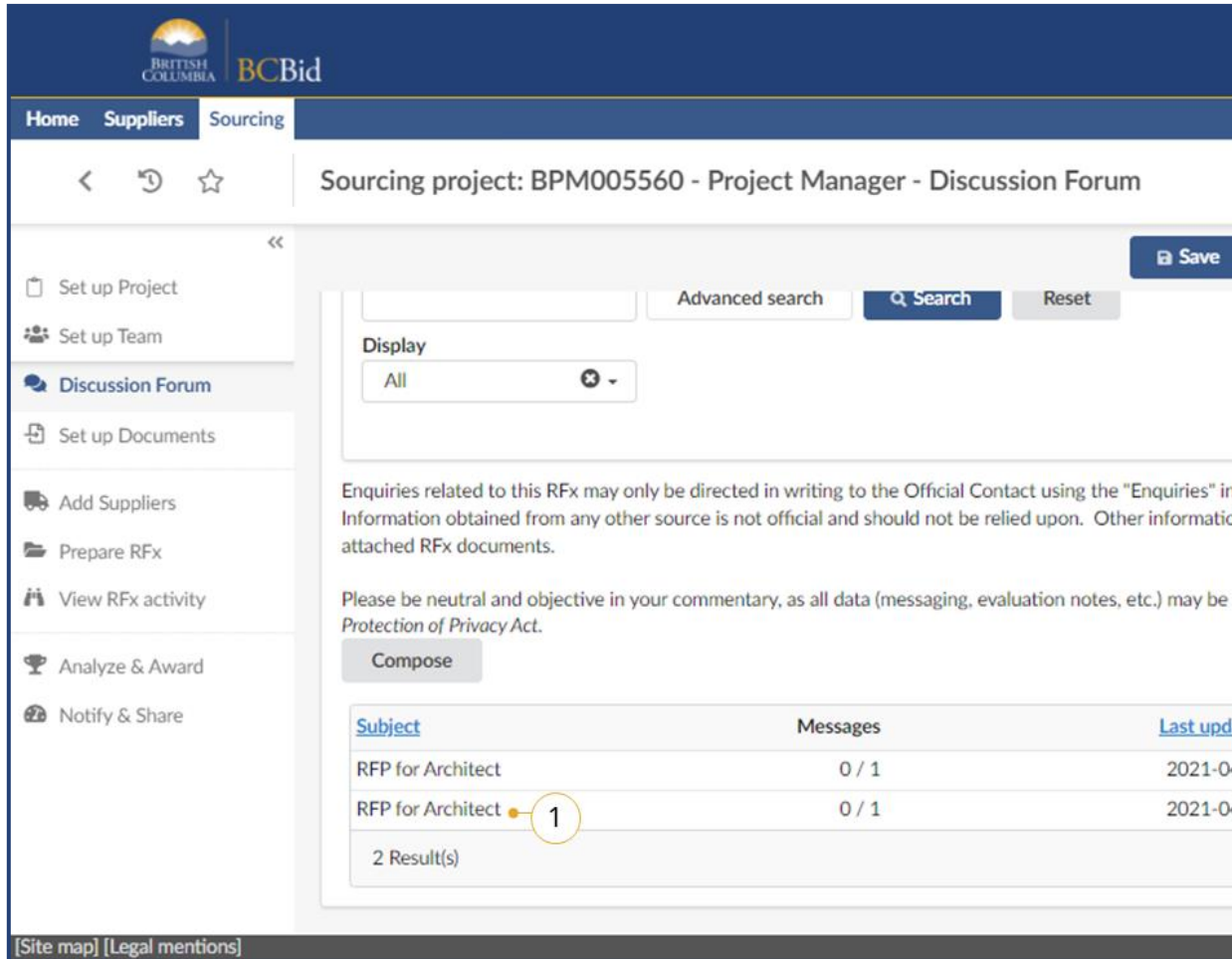


5. Enter the message subject in the **Subject** field. The **Subject** should always include the Opportunity ID and Opportunity description.
6. In the field below, enter your message.
7. Add attachments to your message by clicking **Click or Drag to add files** or directly dragging and dropping a file onto the button.
8. Once your message is ready, click **Send**.



You cannot delete a message once it has been sent.

Print a Communication



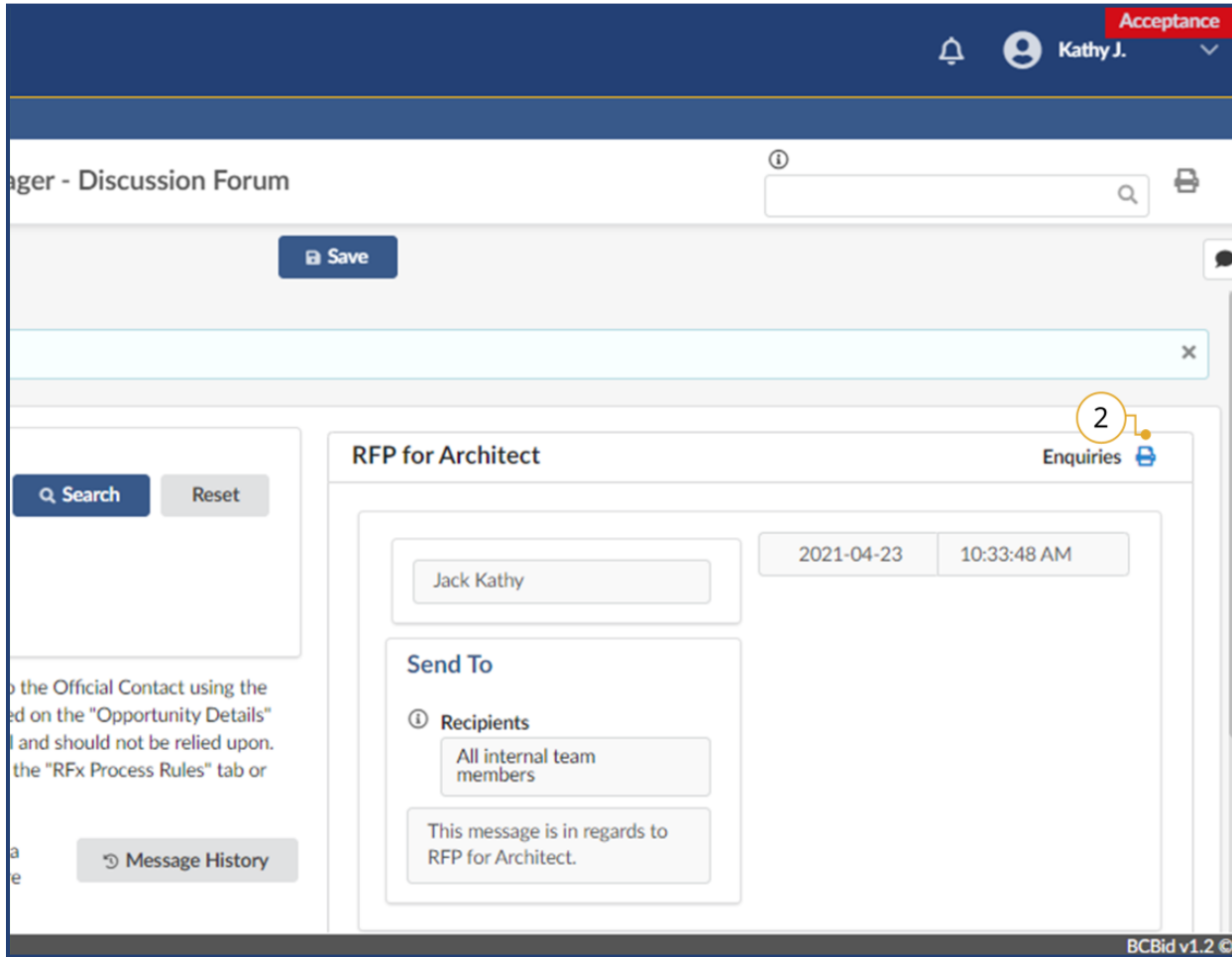
The screenshot shows the BCBid Sourcing project interface for 'Sourcing project: BPM005560 - Project Manager - Discussion Forum'. The left sidebar contains navigation options: Home, Suppliers, Sourcing, Set up Project, Set up Team, Discussion Forum (selected), Set up Documents, Add Suppliers, Prepare RFX, View RFX activity, Analyze & Award, and Notify & Share. The main content area includes a search bar with 'Advanced search', 'Search', and 'Reset' buttons, and a 'Display' dropdown set to 'All'. Below this is a 'Compose' button and a table of messages. The table has columns for 'Subject', 'Messages', and 'Last updated'. Two rows are visible, both for 'RFP for Architect', with '0 / 1' messages and a date of '2021-04'. A yellow circle highlights the number '1' in the second row's 'Messages' column. At the bottom of the table, it says '2 Result(s)'. The footer contains links for '[Site map]' and '[Legal mentions]'.

Subject	Messages	Last updated
RFP for Architect	0 / 1	2021-04
RFP for Architect	0 / 1	2021-04

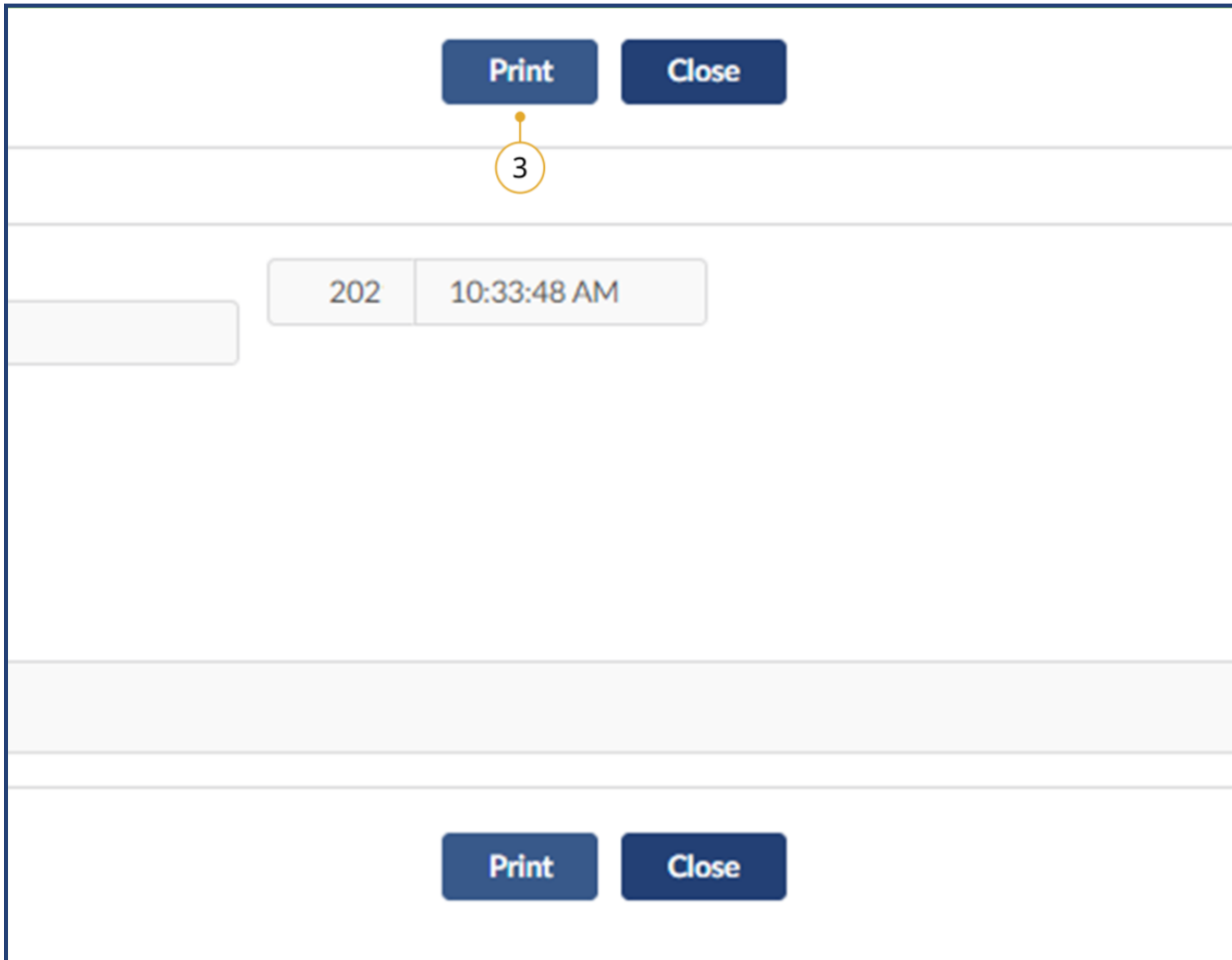
1. Select the communication you would like to print.



Buyers should note that when archiving message data for an Opportunity, i.e. the 'message history', they will need to the print out of each message plus the Excel file to establish who was sent each message. An Excel document showing the content isn't going to cut it so we'll need both. The message spreadsheet can be downloaded via the cog icon.

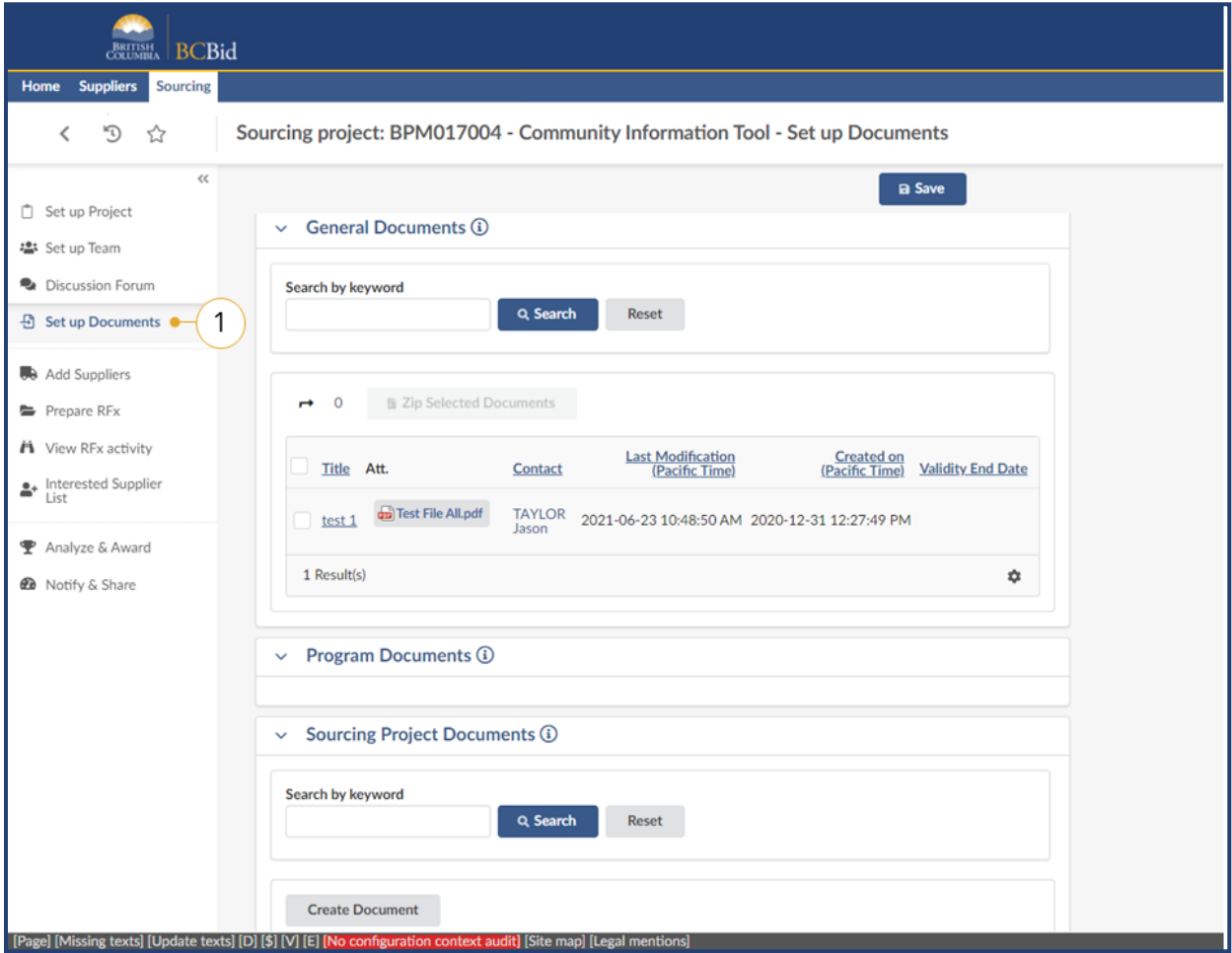


2. Click the **Print** (printer) icon.




3. In the dialog box, click **Print**.

Set up Documents



1. In the left-hand menu, click **Set Up Documents**.

 [Set up Documents](#)

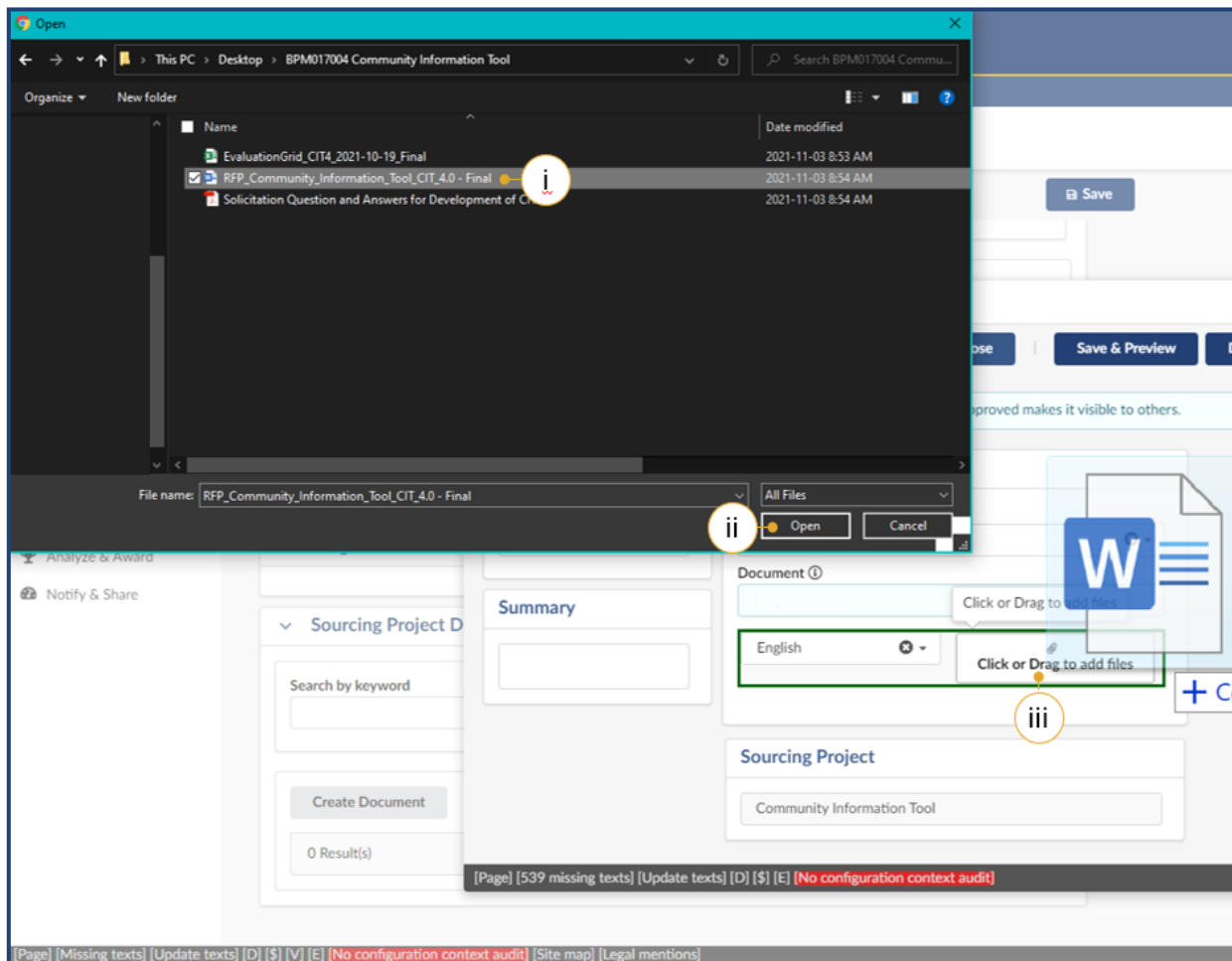
 Provides an list of all the General Documents, Program Documents, and Sourcing Project Documents that are relevant to the project. Buyers can use this screen to upload Sourcing Project Documents.

Uploading Documents

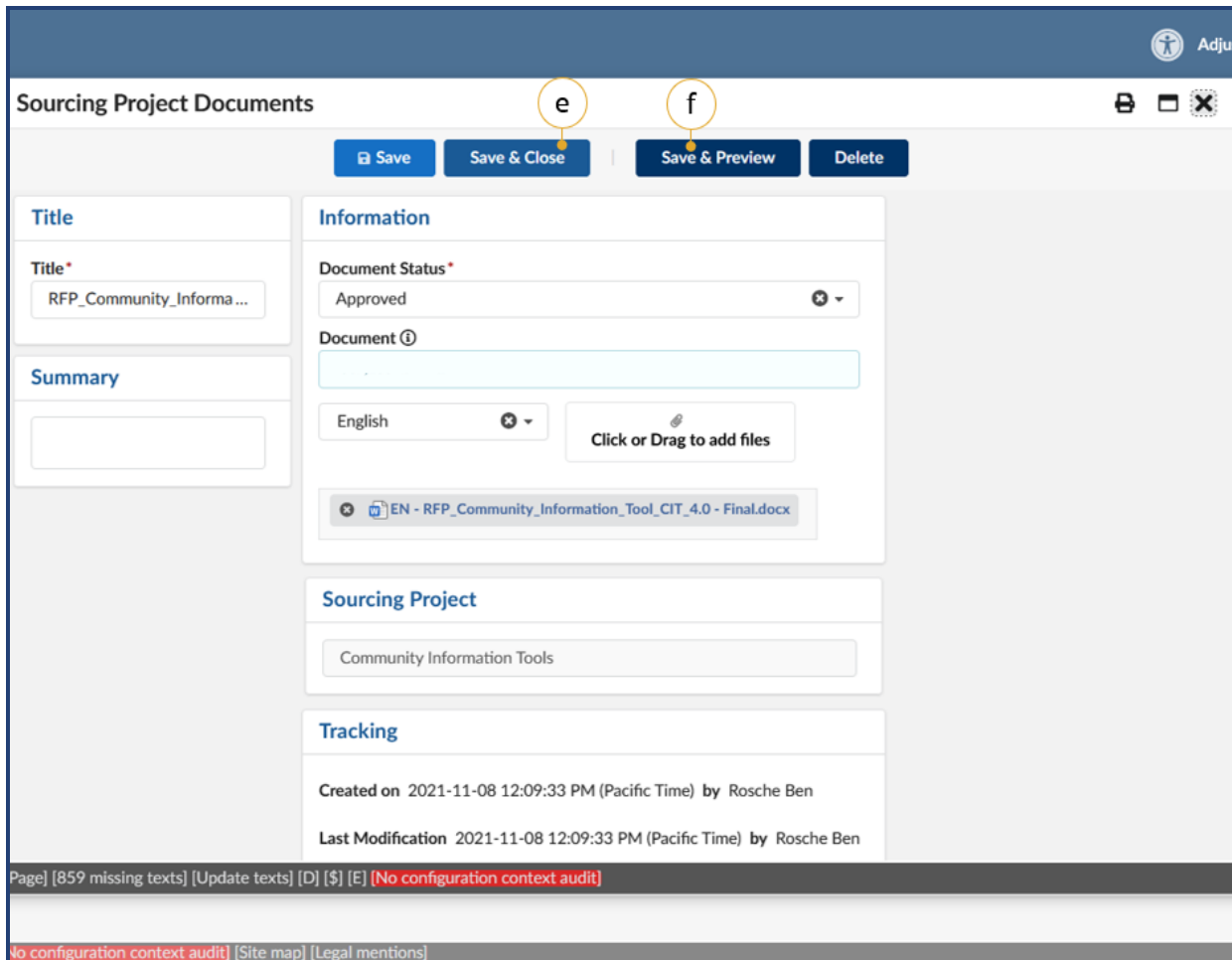
1. Click **Create Document**.
 - a. Enter a **Title**.
 - b. Using the **Document Status** drop-down list, select **Draft** or **Approved**.
 - c. *Optional*: Enter a **Summary**
 - d. Open the file manager application by clicking **Click or Drag to add files**.



Buyers must only upload 1 document per upload.



- iv. Select the document to upload.
- v. Click **Open**.
- vi. Alternatively, open Windows Explorer and drag the file to the **Click or Drag to add files** button.



- e. Click **Save & Preview** to preview the uploaded documents from a Supplier perspective.
- f. Click **Save & Close** to upload.

Downloading Existing Documents

The screenshot displays the 'Sourcing project: BPM017004 - Community Information Tool - Set up Documents' page. 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 main content area is divided into sections: 'General Documents', 'Program Documents', and 'Sourcing Project Documents'. The 'General Documents' section contains a search bar and a table of documents. A 'Zip Selected Documents' button is highlighted with a yellow circle and the number '2'. A checkbox next to the document 'test 1' is highlighted with a yellow circle and the number '1'. The document 'test 1' is associated with the attachment 'Test File All.pdf', contact 'TAYLOR Jason', and dates '2021-06-23 10:48:50 AM' and '2020-12-31 12:27:49 PM'. A 'Save' button is located in the top right corner of the main content area. At the bottom of the page, there is a footer with accessibility information: '[Page] [Missing texts] [Update texts] [D] [\$] [V] [E] [No configuration context audit] [Site map] [Legal mentions]'.

<input checked="" type="checkbox"/>	Title	Att.	Contact	Last Modification (Pacific Time)	Created on (Pacific Time)	Validity End Date
<input checked="" type="checkbox"/>	test 1	Test File All.pdf	TAYLOR Jason	2021-06-23 10:48:50 AM	2020-12-31 12:27:49 PM	

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

Add Suppliers

Home Suppliers Sourcing

Sourcing project: BPM017004 - Community Information Tool - Add Suppliers

Save Extract Supplier List

Set up Project
Set up Team
Discussion Forum
Set up Documents
Add Suppliers 1
Prepare RFX
View RFX activity
Interested Supplier List
Analyze & Award
Notify & Share

Add Suppliers

Invited Suppliers - Warning: Supplier additions are not saved until you click "Save"

If you know the name of the Supplier you want to add, start typing the company in the box. To browse the list of registered Suppliers, select "See All" in the

Select Suppliers

Supplier	DBA	Status	Main Contact	Invited
Public Portal	Public Portal	Active Supplier	Public Portal	<input checked="" type="checkbox"/>

1 Result(s)

Add Suppliers from a Qualified List
After adding suppliers, click Save. Note: the list of suppliers above must be empty (except for the Public Portal) in order for suppliers from the list to be added.

Add Suppliers

[Page] [Missing texts] [Update texts] [D] [\$] [V] [E] [No configuration context audit] [Site map] [Legal mentions]

1. In the left-hand menu, click **Add Suppliers** to review the list of invited suppliers from the Add Suppliers tab.



[Add Suppliers Overview](#)

If adding additional suppliers after initially completing this step: go to the **Prepare RFX, Suppliers** tab, check that the supplier is listed and click **Validate & Save**.

Adding Suppliers Not On Qualified List

BRITISH COLUMBIA BCBid

Home Suppliers Sourcing

Sourcing project: BPM017004 - Community Information Tool - Add Suppliers

Save Extract Supplier List

Set up Project

Set up Team

Discussion Forum

Set up Documents

Add Suppliers

Prepare RFx

View RFx activity

Interested Supplier List

Analyze & Award

Notify & Share

Invited Suppliers - Warning: Supplier additions are not saved until you click "Save"

If you know the name of the Supplier you want to add, start typing the company in the box. To browse the list of registered Suppliers, select "See All" in the

Select Suppliers

Company A

RepresentativeOf, CompanyA
Company A
18 Douglas St V8V 2N6 Victoria

Invited

See All

for the Public Portal) in order for suppliers from the list to be add

[Page] [Missing texts] [Update texts] [D] [\$] [V] [E] [No configuration context audit] [Site map] [Legal mentions]

1. In the **Select Suppliers** drop-down list, start typing in the name of the Supplier to be added, then select it when it displays.
 - a. Click **Save**.
2. If unable to find the Supplier, click **See All**.



[Adding suppliers not on a QSL](#)

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.



Once an opportunity is posted, Suppliers that are selected here will get a notification.

Browse Suppliers

CBid

Suppliers Sourcing

Sourcing project: BPM017004 - Community Information Tool - Add Suppliers

Browse Suppliers

Search by keyword Commodity My Commodities

Alerts Type

Filters Level: Supplier Group x Supplier Head-office x Supplier Site x

Add Supplier	Code	Supplier #	Doing Business as Name	Parent Company	Level	Web site	Status	Qualification	Document Status	Do Val
<input type="checkbox"/>	SUP006188		Circum DBA		Supplier Head-office / Supplier Group		Enrollment Rev.			
<input type="checkbox"/>	SUP006187		Everest DBA		Supplier Head-office / Supplier Group		Registration			
<input type="checkbox"/>	SUP006186		Company C		Supplier Head-office / Supplier Group	companyC.example.com	Active Supplier			
<input type="checkbox"/>	SUP006185		Test4 DBA		Supplier Head-office /		Registration			

[Page] [551 missing texts] [Update texts] [D] [\$] [E] [No configuration context audit]

texts] [D] [\$] [V] [E] [No configuration context audit] [Site map] [Legal mentions]

- In the **Browse Suppliers** window, filter Suppliers using setting search parameters. Once search parameters are set, click **Search**.
- Once the Supplier(s) to be added are found, select the **checkbox(s)** in the **Add Supplier** column.
- Click the **X** to add and close the Browse Suppliers window.
- When the Browse Suppliers window closes, click **Save** on the Add Suppliers tab.

Removing Suppliers and Extracting Supplier List

Invited Suppliers - Warning: Supplier additions are not saved until you click "Save"

If you know the name of the Supplier you want to add, start typing the company in the box. To browse the list of registered Suppliers, select "See All" in the box.

Select Suppliers

Supplier	DBA	Status	Main Contact	Invited
CompanyB, RepresentativeOf	Company B	Active Supplier	RepresentativeOf CompanyB	<input checked="" type="checkbox"/>
CompanyC, RepresentativeOf	Company C	Active Supplier	RepresentativeOf CompanyC	<input checked="" type="checkbox"/>
Public Portal	Public Portal	Active Supplier	Public Portal	<input checked="" type="checkbox"/>
RepresentativeOf, CompanyA	Company A	Active Supplier	CompanyA RepresentativeOf	<input checked="" type="checkbox"/>

4 Result(s)

Add Suppliers from a Qualified List
After adding suppliers, click Save. Note: the list of suppliers above must be empty (except for the Public Portal) in order for suppliers from the list to be added.

1. To remove a Supplier, select the **X** next to the Supplier name.
2. To remove a Supplier from the invitation list, select the **checkbox** in the Invited column.
3. Click **Extract Supplier List**.
4. Click **Save**



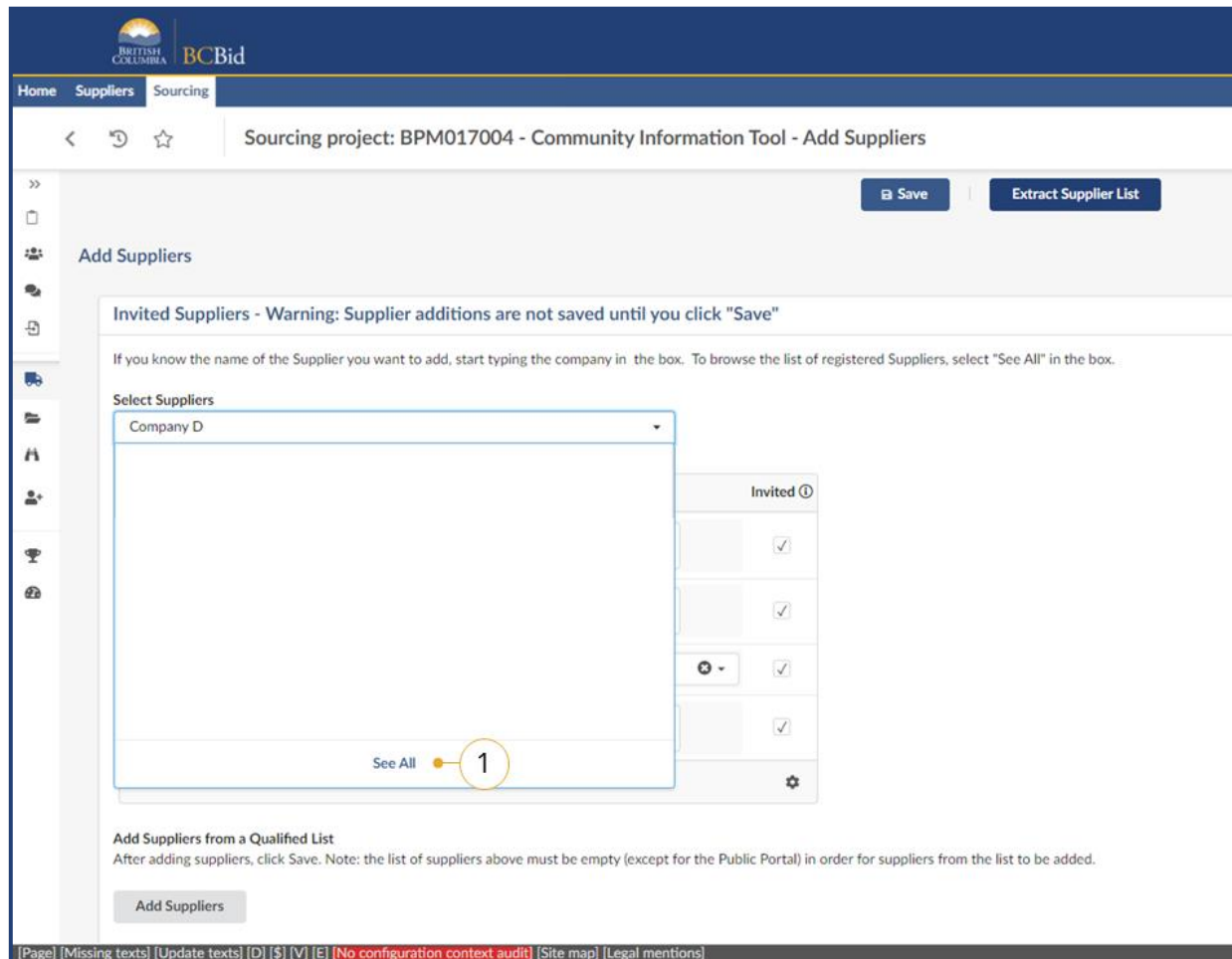
[Removing suppliers and extracting a supplier list](#)



For limited competitions that are below trade thresholds or competitions that are run off a Qualified Suppliers List, do not remove **Public Portal** from the invitation. The Public Portal needs to be selected to allow addenda to be visible to invited suppliers.

Creating a New Supplier

Creating a new Supplier is used when the Buyer is uploading Submission data from a Supplier that is not yet identified in BC Bid. 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.



1. In the **Select Suppliers** drop-down list, select **See All**.



[Creating a new Supplier](#)

Browse Suppliers

Search by keyword: Commodity: My Commodities To confirm your selection, click the X in the top right corner.

Alerts: Type:

Filters: Level: Supplier Group Supplier Head-office Supplier Site

2

Add Supplier	Code	Supplier #	Doing Business as Name	Parent Company	Level	Web site	Status	Qualification
<input type="checkbox"/>	SUP006188		Circum DBA		Supplier Head-office / Supplier Group		Enrollment Rev.	
<input type="checkbox"/>	SUP006187		Everest DBA		Supplier Head-office / Supplier Group		Registration	
<input type="checkbox"/>	SUP006186		Company C		Supplier Head-office / Supplier Group	companyC.example.com	Active Supplier	
<input type="checkbox"/>	SUP006185		Test4 DBA		Supplier Head-office /		Registration	

[Page] [551 missing texts] [Update texts] [D] [\$] [E] [No configuration context audit]

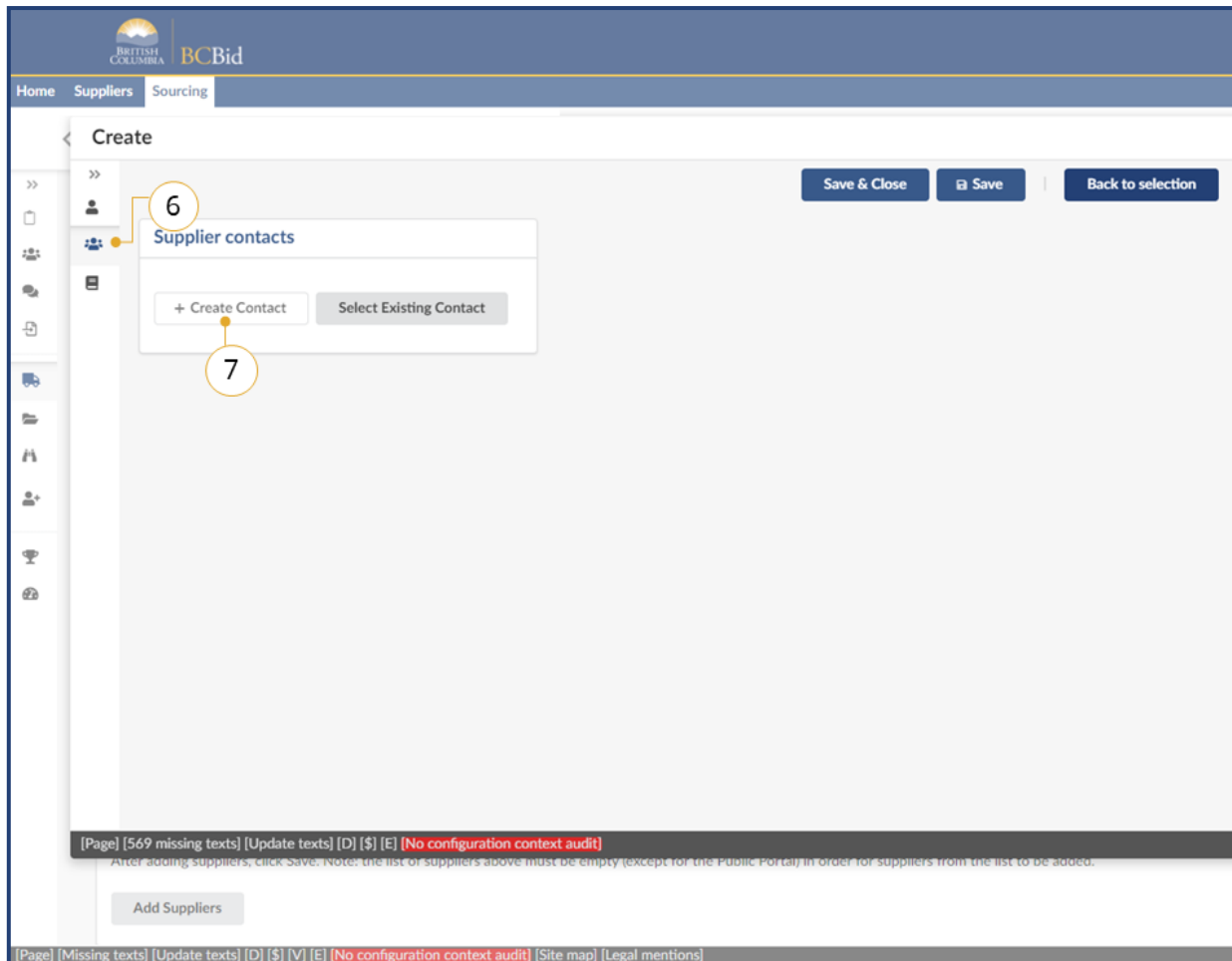
[Page] [Missing texts] [Update texts] [D] [\$] [V] [E] [No configuration context audit] [Site map] [Legal mentions]

2. In the Browse Suppliers window, click **Create Supplier**.

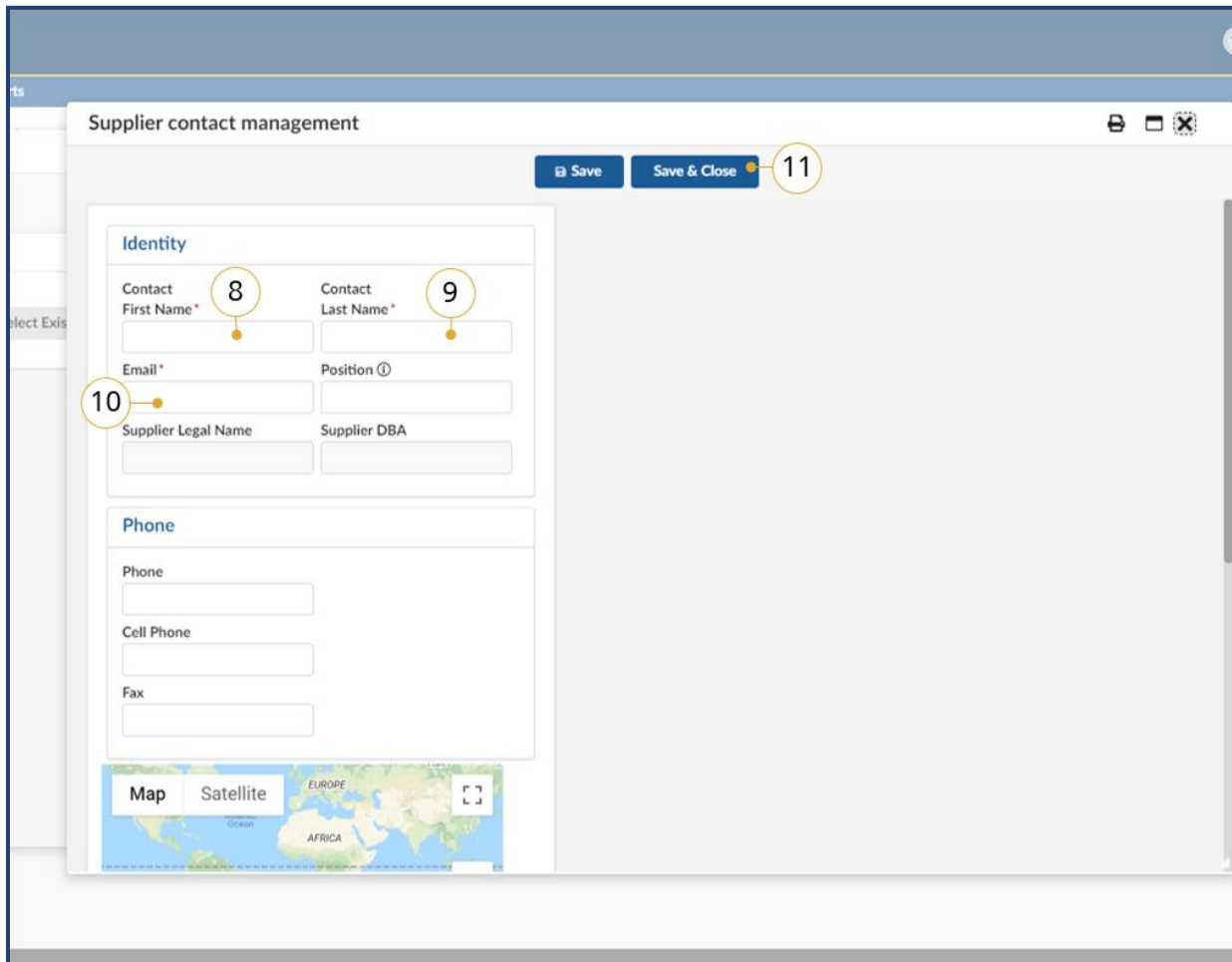
The screenshot shows the 'Create' form for adding a supplier in the BC Bid system. The form is divided into two main sections: 'Supplier Information' and 'Address'. The 'Supplier Information' section contains fields for 'Doing Business as Name', 'Type', 'Legal Name', 'Responsible', 'Website', 'Legal Structure', 'Year Founded', and 'Company Size'. The 'Address' section includes a map, 'Address Label', 'Office Street Address', 'Mailing Address (if different)', 'City', 'Postal / Zip Code', 'State/Province', and 'Country'. Numbered callouts 1 through 5 highlight specific fields: 1 points to the 'Doing Business as Name' field, 2 to the 'Type' dropdown, 3 to the 'Legal Name' field, 4 to the 'Country' dropdown, and 5 to the 'Save' button. The 'Save' button is located at the top right of the form, next to 'Save & Close' and 'Back to selection' buttons. The 'Country' dropdown is located at the bottom right of the 'Address' section. The 'Legal Name' field is located in the 'Supplier Information' section. The 'Type' dropdown is located in the 'Supplier Information' section. The 'Doing Business as Name' field is located in the 'Supplier Information' section. The 'Save' button is located at the top right of the form.

1. In the Doing Business as Name textbox, enter the business name the Supplier is operating as.
2. In the **Type** drop-down list select Vendor or Shell for offline Submissions, as applicable.
3. In the Legal Name textbox, enter the Suppliers legal name.
4. In the **Country** drop-down list, select the Country the Supplier is in.
5. Click **Save**.

Note: SHELL supplier accounts require an address to comply with trade agreement requirements.



6. In the left-hand navigation pane, click the **Contacts** tab.
7. Select the **+ Create Contact** button.



8. In the **Contact First Name** textbox, enter the Supplier contact's first name.
9. In the **Contact Last Name** textbox, enter the Supplier contact's last name
10. In the **Email** textbox, enter the Supplier contact's email address.
11. Click **Save & Close**.

BRITISH COLUMBIA BCBid

Home Suppliers Sourcing

Create

Supplier contacts

+ Create Contact Select Existing Contact

Contact	Role	Other assigned suppliers
Last First	<input type="checkbox"/> Supplier admin	

Save & Close Save Back to selection

[Page] [569 missing texts] [Update texts] [D] [\$] [E] [No configuration context audit]

After adding suppliers, click Save. Note: the list of suppliers above must be empty (except for the Public Portal) in order for suppliers from the list to be added.

Add Suppliers

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12. Click **Save & Close**.

Adding Suppliers From a Qualified Suppliers List

Use the checkbox to add qualified suppliers from RFQ lists available to you below.

Search by keyword

Opportunity Type

Multiuse List Request for Qualification, e-Multiuse List Request for Qualification

Filters Opportunity Type: Multiuse List Request for Qualification e-Multiuse List Request for Qualification Opportunity Type: Multiuse List Request for Qualification e-Multiuse List Request for Qualification

Commodity	Opportunity Description	Can be used by all	Opportunity ID	Can be used by?
<input type="checkbox"/> 10000000 - Live Plant and Animal Material and Accessories and Supplies	081921 mrfq	<input checked="" type="checkbox"/>	• 12728 • 12728 • 12731	
<input type="checkbox"/> 10000000 - Live Plant and Animal Material and Accessories and Supplies	091621 murfq	<input checked="" type="checkbox"/>	13385	
<input type="checkbox"/> 10000000 - Live Plant and Animal Material and Accessories and Supplies	mrfq	<input checked="" type="checkbox"/>	• 12619 • 12619	
<input type="checkbox"/> 10000000 - Live Plant and Animal Material and Accessories and Supplies	mrfq 07	<input checked="" type="checkbox"/>	14243	

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1. Click **Add Suppliers**.

- Insert a keyword in the **Search by keyword** textbox.
- Click **Search**.
- When the Qualified Suppliers List is located, select the **checkbox** to add the Qualified Suppliers List.
- Click **Save** after the Qualified Suppliers List closes.



[How to Add from a Multi-use List Qualified Suppliers List](#)

Step 2 – Prepare RFx

Setup

This section is where all public or Supplier facing information on the Opportunity are inputted or uploaded. You will be working your way left to right through the tabs (e.g. Setup, Additional RFx; Documents; Suppliers; and Approvals and Approvals Workflow if needed).

1. In the left-hand menu, click Prepare RFx.
 - a. In the **Opportunity Type** drop-down list, select the applicable Opportunity Type.
 - b. In the **Opportunity Description** text box, confirm the description of the opportunity. Changing the Opportunity Description here will not change the Opportunity Description on the Set up Project tab.
 - c. In the **Summary Details** text box, enter a summary of the Opportunity.

Note: Once the Opportunity Type is selected and Validate & Save is clicked, the Opportunity Type cannot be changed.

Home Suppliers Sourcing

Sourcing project: BPM017004 - Community Information Tool - Prepare RFX

Validate & Save

Draft

Opportunity Type*
Request for Proposal

Opportunity Description*
Community Information Tool

Lot # ⓘ
1

Amendment # ⓘ
0

Summary Details ⓘ*

The Ministry of Citizens' Services, Connectivity Division, is soliciting for a contractor to enhance our Community Information Tools (CIT) to perform the following current and future state of connectivity projects in BC; integrate connectivity data and other sector-based data into CIT to enable rapid analysis to support investment making; incorporate strong linkages and user centered design to provide more intuitive features. Budget maximum is \$250K.

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

Issue Date ⓘ*
2021-11-09 2:00:00 PM ⓘ Auto issuing ⓘ

Closing Date & Time ⓘ*
2021-12-08 12:00:00 PM ⓘ Auto closure ⓘ

[Page] [Missing texts] [Update texts] [D] [\$] [V] [E] [No configuration context audit] [Site map] [Legal mentions]

- d. Select an **Issue Date**.
- e. *Optional*: Click **Auto issuing**. If Auto issuing is selected, there will be no Ready to Issue button in [Step 3 – Issue an Opportunity](#).
- f. Select a **Closing Date & Time**.
- g. Click **Validate & Save**.

Note: Auto issuing will automatically issue the opportunity to BC Bid at the selected Issue date & time, once all approvals are completed. For MUL, see [Multi-use List Setup](#). If not, continue to the next page.



After your first Validate and Save, you may see alert/error messages related to incomplete mandatory fields in this and other tabs. Review other tabs and fill in fields. Validate and Save often. Mandatory error guidance will be visible on the Setup tab.

BRITISH COLUMBIA BC Bid

Home Suppliers Sourcing

Sourcing project: BPM017004 - Community Information Tool - Prepare RFx

Validate & Save Ready to Issue

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

Estimated Amount (CAD) ⓘ*
250000 h

Category*
Services ⓘ i
Construction
Goods

The Ministry of Citizens' Services, Connectivity Division, is soliciting for a contractor to enhance our Community Information Tools (CIT) to perform the following current and future state of connectivity projects in BC; integrate connectivity data and other sector-based data into CIT to enable rapid analysis to support investment making; incorporate strong linkages and user centered design to provide more intuitive features. Budget maximum is \$250K.

Add shortlisted suppliers from a single-use RFQ

j Add shortlisted suppliers ⓘ
To add all shortlisted suppliers from a single-use Request For Qualifications to this RFx, check the checkbox and click Save.

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

Issue Date ⓘ*
2021-11-09 2:00:00 PM ⓘ Auto issuing ⓘ

Closing Date & Time ⓘ*
2021-12-08 2:00:00 PM ⓘ Auto closure ⓘ

Enquiries Deadline ⓘ
12:00:00 AM ⓘ

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Continuing in the **Setup** tab.

- h. In the **Estimated Amount (CAD)** field, insert the estimated value of the end contract.
- i. In the **Category** drop-down list, select a category.
- j. *Optional:* Select the **Add shortlisted suppliers checkbox**, if the Opportunity is the Lot after a Single-use Request for Qualifications. See [Create New Lot](#).



Depending on the Opportunity Type, a Buyer may not see all fields. Although not in the screenshot, Opportunity ID can be edited as required.

Home Sourcing

Sourcing project: BPM017004 - Community Information Tool - Prepare RFX

Validate & Save Ready to Issue

2021-11-09 2:00:00 PM Auto issuing

Closing Date & Time* 2021-12-08 2:00:00 PM Auto closure

Enquiries Deadline 12:00:00 AM

Interested Supplier List used for this RFX

NDA required from Suppliers

Visible to Public

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.

Tracking

Created on 2021-11-08 11:57:06 AM (Pacific Time)

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- k. *Optional:* In the **Enquiries Deadline** field, select the deadline for submitting enquiries.
Note: if at a later time the closing date is extended, the enquiries deadline can be extended without an amendment.
- l. *Optional:* If applicable to the Opportunity Type, select the **Interested Supplier List used for this RFX** checkbox to create a public facing interested suppliers list. Contact your Ministry Procurement Specialist prior to using.
- m. *Optional:* If an **NDA** is required, select the **NDA required from Suppliers** checkbox to add the NDA workflow to the Opportunity.
- n. *Optional:* In the **Visible to Public** section, deselect the **Post this opportunity publicly?** checkbox. This step is for invite-only.
- o. Click **Validate & Save**.



At this stage you will be prompted to complete all mandatory fields that can be found on the Additional RFX tab and the Approvals tab. For procurement processes that are not MUL, skip Multi-use List Setup and see Additional RFX.

Multi-use List Setup

BRITISH COLUMBIA BCBid

Home Suppliers Sourcing

Sourcing project: BPM008868 - Pre-Qualified List of Painters (Multiuse List) - P...

Validate & Save Ready to Issue

Category: Services

Summary Details ⓘ*

The Ministry of Citizens' Services, Procurement and Supply Division (PSD), is seeking a list of pre-qualified p... Road, Victoria, BC.

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

Issue Date ⓘ*
2021-06-07 11:30:00 AM ⓘ Auto issuing ⓘ

Termination Date ⓘ*
2023-06-06 2:00:00 PM ⓘ

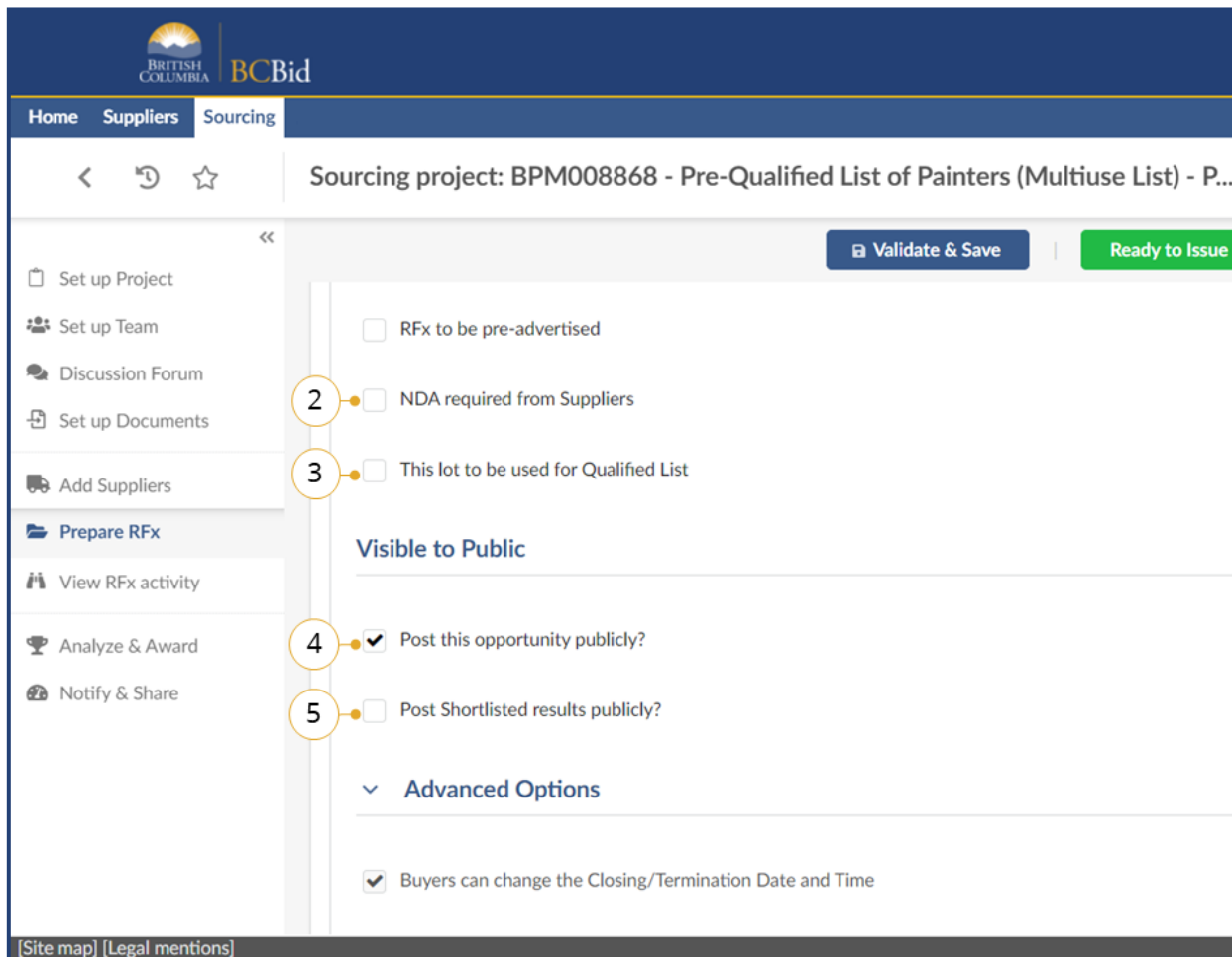
Initial Intake Date and Time ⓘ
2021-06-14 2:00:00 PM ⓘ 1

RFX to be pre-advertised

[Site map] [Legal mentions]

1. *Optional:* Select an **Initial Intake Date and Time** for the initial batch of submissions for evaluation.

Note: This date is visible to Suppliers.



2. *Optional:* If a Non-Disclosure Agreement (NDA) is required for the Opportunity, select the **NDA required from Suppliers**.
3. *Optional:* Select **This lot to be used for Qualified List** checkbox if the MUL will have multiple lots or stages of evaluations
4. *Optional:* Select the **Post Shortlisted results publicly?** if the results of the MUL are to be posted publicly.
5. *Optional:* Select or unselect the **Post this opportunity publicly?** checkbox as appropriate.



RFx to be pre-advertised checkbox and the checkboxes under Advanced Options section are not to be used for MULs. To save all progress, Buyers must select Save before navigating to a different tab or menu. If the lot is to be used for Qualified List checkbox is selected, Buyer needs to state which 'Lot' will be the one where the final shortlisting will happen.

Additional RFX

1

Validate & Save Ready to Issue

Setup Additional RFX Info Documents Suppliers Approvals Approval Workflow

Prepare RFX - Additional RFX Info

Save

Official Contact 2

Enquiries related to this RFX may only be directed in writing to the Official Contact using the "enquiries" interface, if available, or the email address identified. This information should not be relied upon. Other information and rules regarding enquiries are set out in the "process rules" tab or within the attached RFX documents.

Official Contact	Contact email
Ben Rosche	Ben.Rosche@gov.bc.ca

a

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

The email address on your buyer profile is displayed by default to suppliers. If you want to provide an alternate email account that you monitor (e.g. a general email address).

Alternate email

b

Submissions

Submissions must be submitted using one of the following delivery methods *

BC Bid Electronic Submission: Submit an electronic Submission using BC Bid. Submissions must be in accordance with the requirements set out in the BC Bid system. A 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 requirements set out in the BC Bid system.

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1. Click the **Additional RFX Info** tab.
2. Review the **Official Contact**.
 - a. To edit the Official Contact, click **Set up Team** and change the Official Contact.
 - b. *Optional:* Enter an **alternate email**, this will replace the default email address of the Official Contact.



[Additional RFX Info](#)



The **Save** button is different than **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.

Home Suppliers Sourcing

Sourcing project: BPM017004 - Community Information Tool - Prepare RFx

Validate & Save Ready to Issue

3

Submissions

Submissions must be submitted using one of the following delivery methods *

- BC Bid Electronic Submission:** Submit an electronic Submission using BC Bid. Submissions must be in accordance with the requirements set out a 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 opportunity description and ID in the subject line of the email.
- Hard Copy Submission:** Submit one (1) paper hard-copy of Your Submission together with one (1) electronic copy of Your Submission saved on a U this manner should be contained within an envelope clearly marked with Your name and address, the Opportunity Description and ID number and

Refer to the [Guidelines for the Receipt of Submissions Via Email](#) before selecting the email option

Delivery Location for Goods, Services, or Construction

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 a region, dep

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 fie

Map Satellite EUROPE AFRICA SOUTH AMERICA Indian Ocean

[Page] [Missing texts] [Update texts] [D] [\$] [V] [E] [No configuration context audit] [Site map] [Legal mentions]

3. Within the **Submissions** section, select the delivery methods using the appropriate checkboxes. If **Hard Copy Submission** is selected, enter Physical Address for delivery. If **Email Submission** is selected, enter the email address for delivery.

Home Suppliers Sourcing

Sourcing project: BPM017004 - Community Information Tool - Prepare RFX

Validate & Save Ready to Issue

Delivery Location for Goods, Services, or Construction 4

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 a region, dep

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 fie

Map Satellite

Office Street Address
search for an address, a place, a monument or longitude...

Postal Code City

Country State/Province

Latitude Longitude

a

[Page] [Missing texts] [Update texts] [D] [\$] [V] [E] [No configuration context audit] [Site map] [Legal mentions]

4. On the same page in the **Delivery Location** for **Goods, Service or Construction** section.
 - a. Enter a location.

Home Suppliers Sourcing

Sourcing project: BPM083742 - Community Information Tool - Prepare RFX

Save and Close Validate & Save Ready to Issue Other Actions

Country State/Province

Latitude Longitude

b No physical location (e.g. vendor can carry out the work remotely)

2. Select region(s) where the work will be done or goods will be delivered to
Select all that apply. Don't know which region to pick? Refer to [WorkBC's Regional Profiles](#).

Regions*

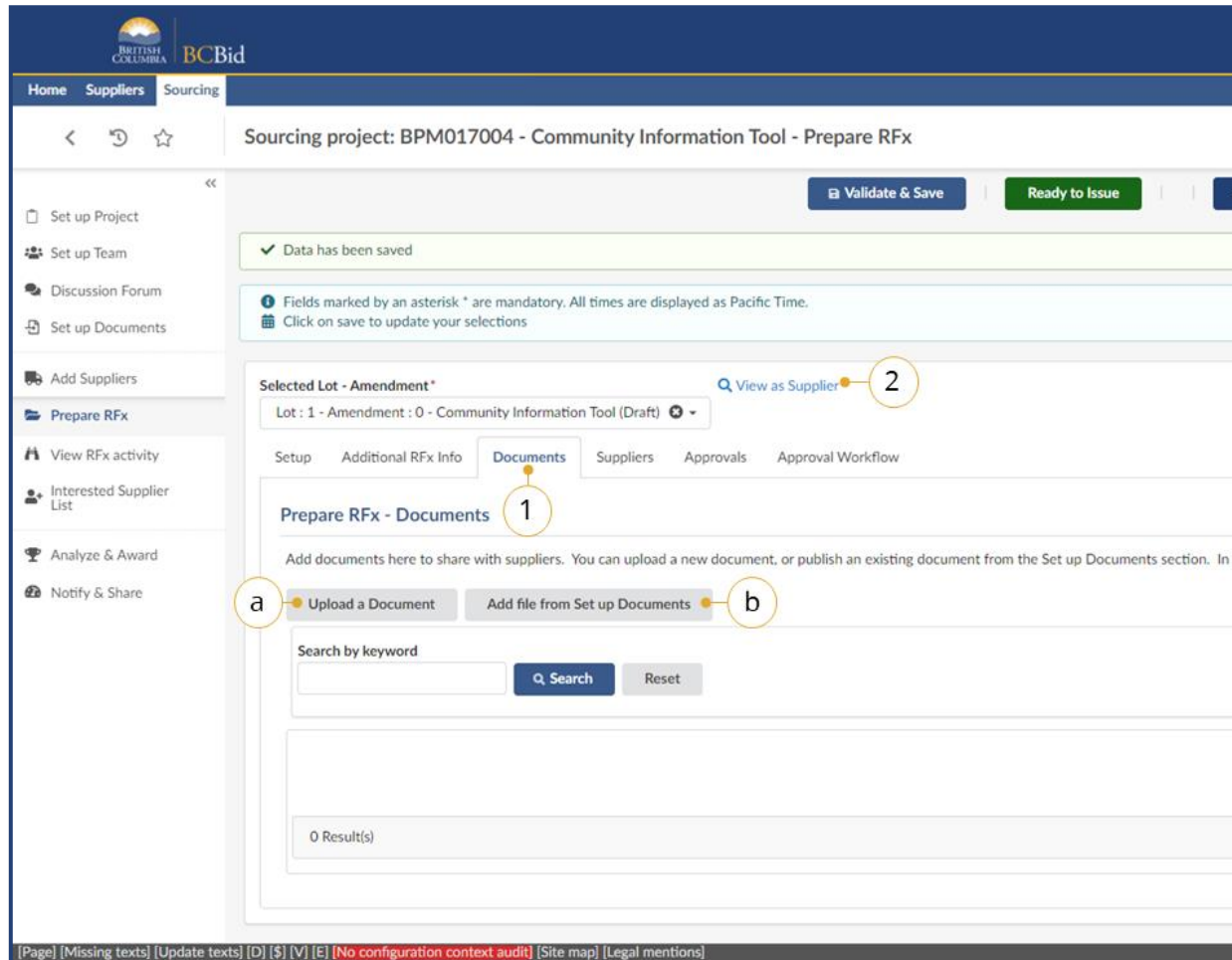
British Columbia x c

3. Additional Information
If there are more details the supplier will need to know about the location, please provide them here:


d

- b. Select the **No physical location...** checkbox if the work can be done remotely.
- c. Select the **Regions** where the goods or services will be delivered from the drop-down list.
- d. Enter any **Additional Information** as required.

Documents



1. Click the **Documents** tab.
 - a. If adding a new document, click **Upload a Document**. Once selected, see [Uploading Documents](#). Only add new Documents to the Set up Documents tab, then upload them using the following steps.
 - b. If adding an existing document, from the Set up Documents tab, select **Add file from Set up Documents**.
2. *Optional:* Click **View as Supplier** to review the Opportunity from the Supplier perspective.

 Documents to be uploaded on the Documents tab must be in **Approved** status to be posted publicly. Documents uploaded on the Documents tab will also be visible in Set up Documents.

Uploading Existing Documents

The screenshot displays the 'Sourcing Project / Documents' page in the BCBid system. The page is divided into several sections:

- Top Bar:** Includes the BCBid logo and navigation tabs like 'Home', 'Sourcing', 'Documents', etc.
- Document List:** A table showing document details. The first document is 'test_1' (Test File All.pdf) by TAYLOR Jason, created on 2021-06-23 10:48:50 AM and last modified on 2020-12-31 12:27:49 PM. A circled 'iii' points to the 'Save & Close' button above this list.
- Program Documents:** A section for program-related documents.
- Sourcing Project Documents:** A section for documents related to the current sourcing project. A circled 'i' points to this section header. Below it is a search bar with a 'Search' button and a 'Reset' button.
- Document Selection:** A 'Zip Selected Documents' button is shown with a count of '1'. Below it, a table lists documents. The document 'RFP_Community_Information_Tool' (RFP_Community_Information_Tool_CIT_4.0 - Final.docx) by ROSCHE Ben is selected, and its checkbox is highlighted with a circled 'ii'.

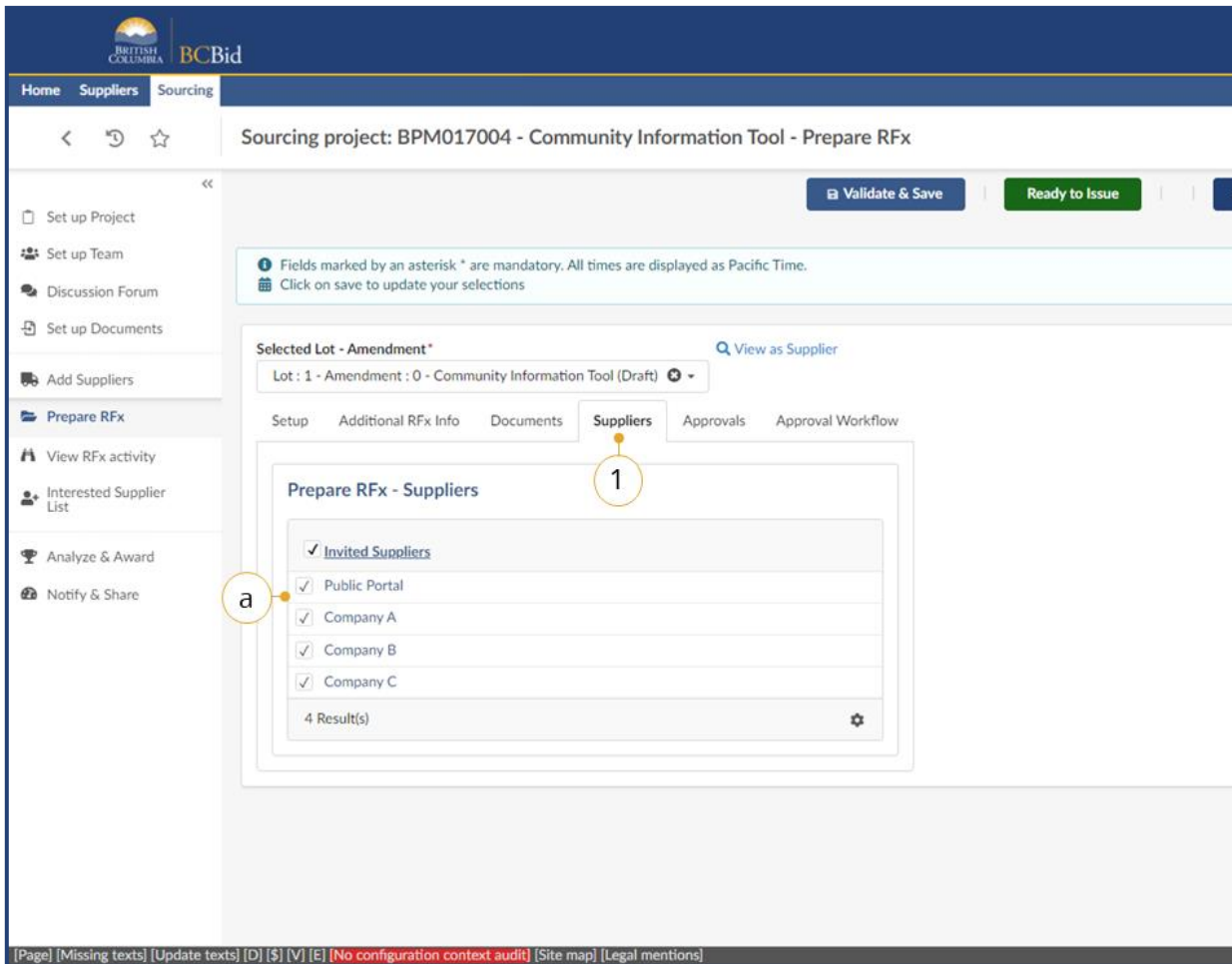
At the bottom of the page, there are status messages: '[Page] [602 missing texts] [Update texts] [D] [\$] [E] [No configuration context audit]' and '[Page] [Missing texts] [Update texts] [D] [\$] [V] [E] [No configuration context audit] [Site map] [Legal mentions]'.

- i. Navigate to the document(s) location.
- ii. Select the **checkbox** next to the document(s) to be added from any of the lists on the Set up Documents tab.
- iii. Click **Save & Close**.



[How to add documents to an Opportunity](#)

Suppliers

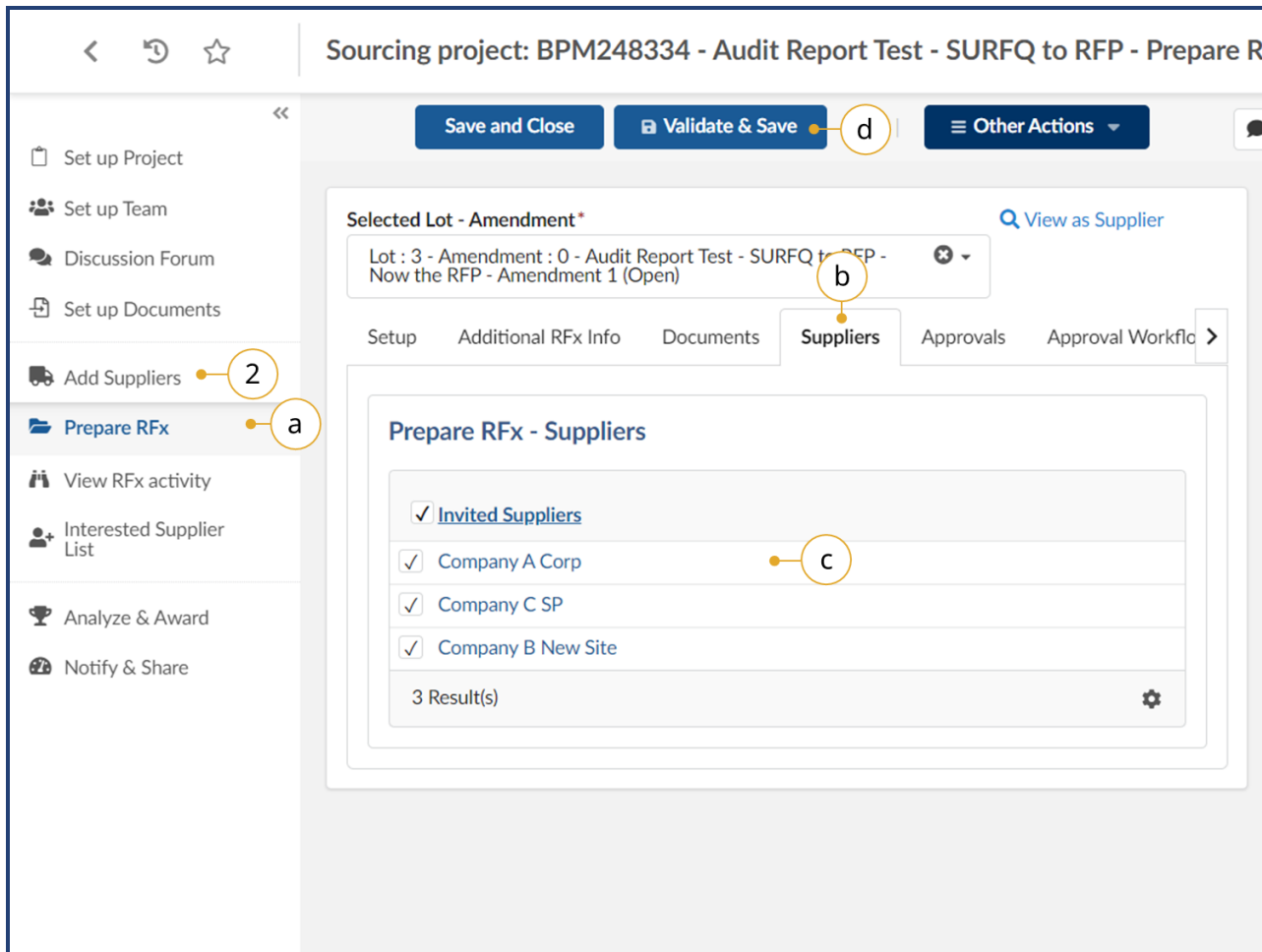


1. *Optional:* Click the **Suppliers** tab.
 - a. Select or unselect **checkboxes** next to supplier as applicable.

Even if the opportunity isn't posted publicly (from the Prepare RFX Setup tab) the Public Portal needs to be selected to allow addenda to be visible to invited suppliers.



This tab is a due diligence tab. On this tab the Responsible will ensure that the correct Suppliers are invited to the Opportunity.



2. Optional: To add additional Suppliers, return to the **Add Suppliers** tab.
3. If additional supplier(s) were added on the Add Suppliers tab:
 - a. Click on **Prepare RFX**.
 - b. Click on **Suppliers**.
 - c. Confirm that the added supplier(s) is listed.
 - d. Click **Validate & Save**.

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

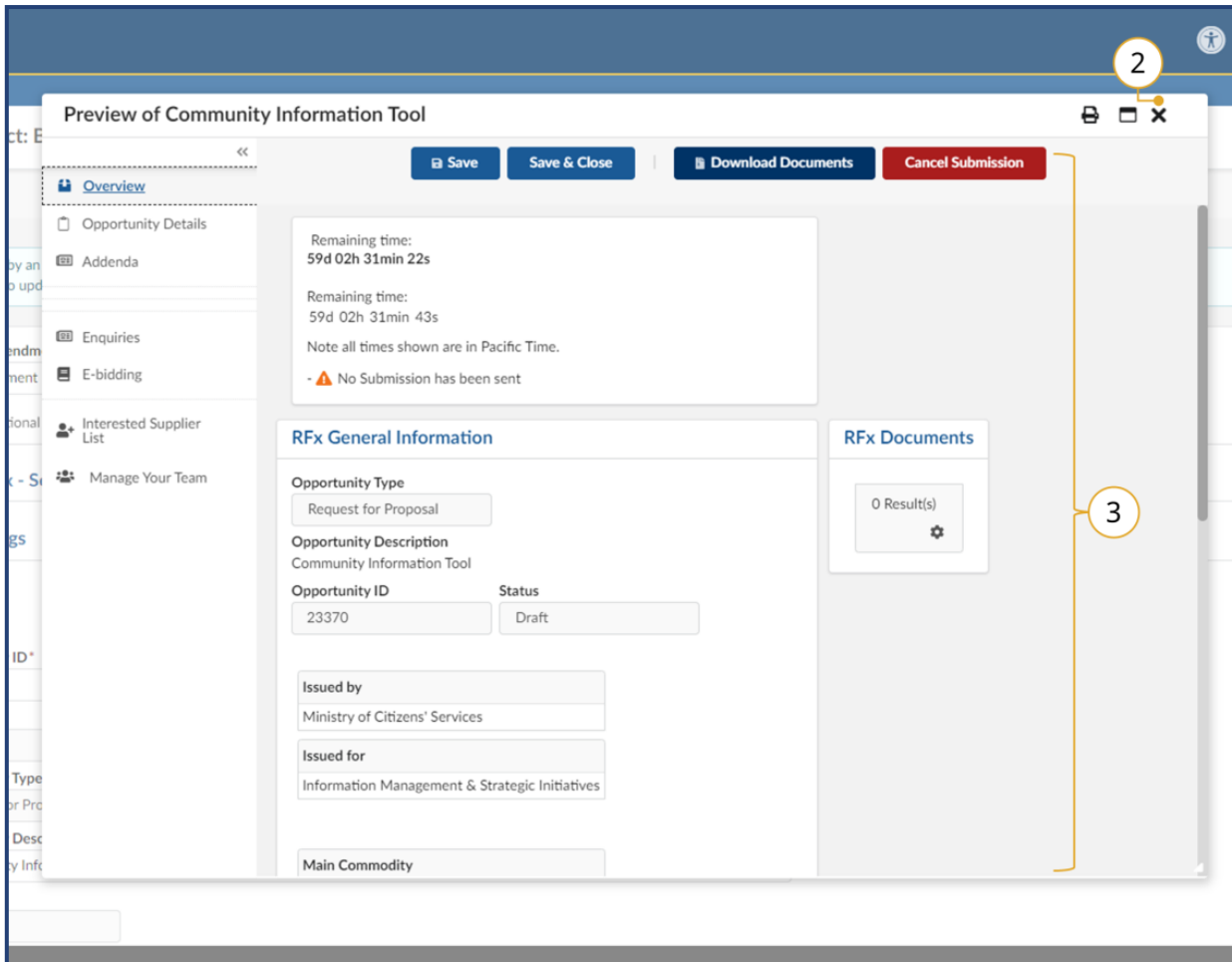


If the **Validate & Save** step is not completed, additional Suppliers will not be notified of the Opportunity.

Check Supplier View

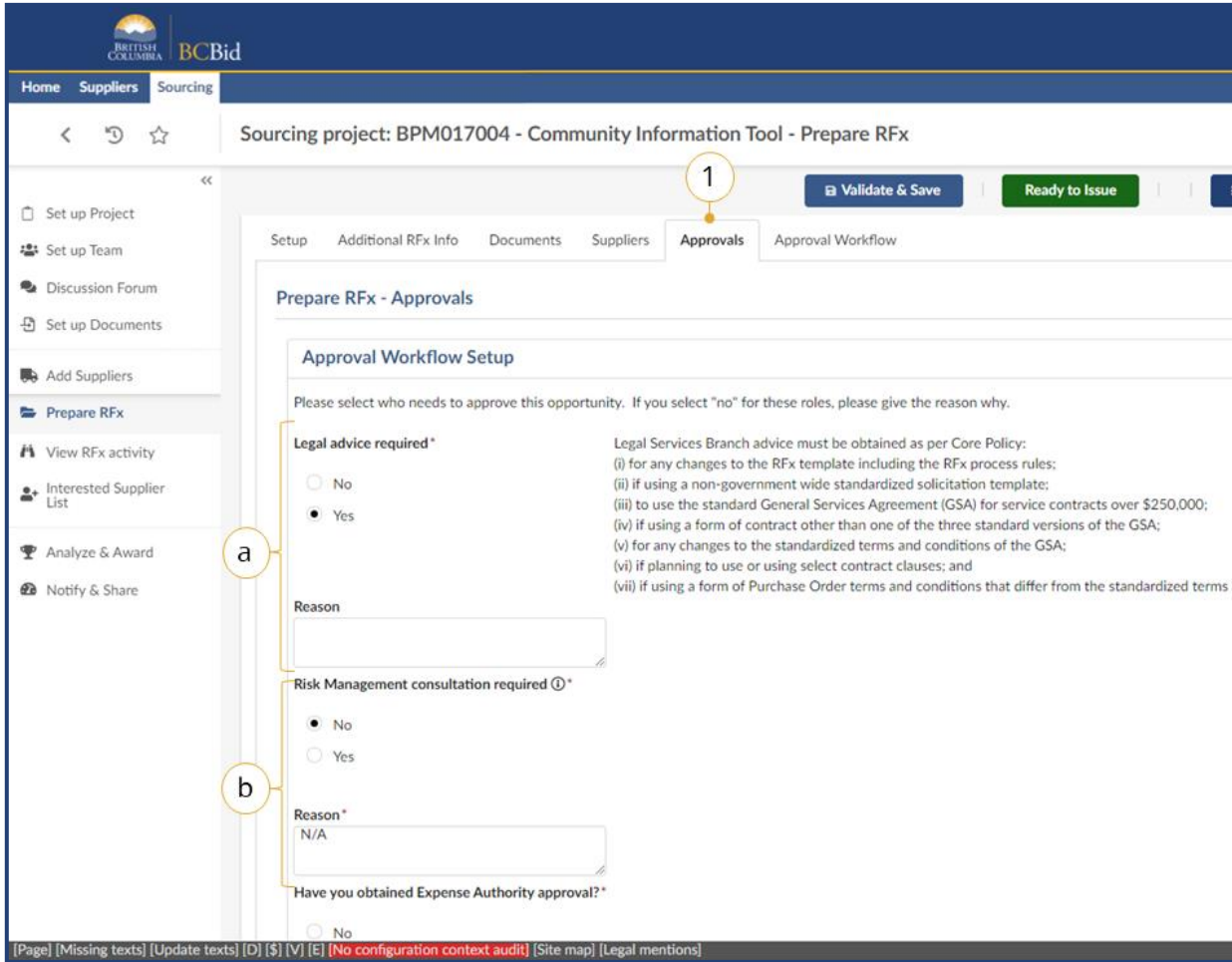
The screenshot displays the BCBid Sourcing project interface for 'Sourcing project: BPM017004 - Community Information Tool - Prepare RFX'. The interface includes a navigation menu on the left with options like 'Set up Project', 'Set up Team', 'Discussion Forum', 'Set up Documents', 'Add Suppliers', 'Prepare RFX', 'View RFX activity', 'Interested Supplier List', 'Analyze & Award', and 'Notify & Share'. The main content area shows the 'Selected Lot - Amendment*' section with a dropdown menu for 'Lot: 1 - Amendment: 0 - Community Information Tool (Draft)'. A 'View as Supplier' button is circled in red and labeled with a '1'. Below this, there are tabs for 'Setup', 'Additional RFX Info', 'Documents', 'Suppliers', 'Approvals', and 'Approval Workflow'. The 'Suppliers' tab is active, showing a 'Prepare RFX - Suppliers' section with a list of invited suppliers: 'Invited Suppliers', 'Public Portal', 'Company A', 'Company B', and 'Company C'. The list shows '4 Result(s)' and a gear icon for settings. At the top right, there are buttons for 'Validate & Save' and 'Ready to Issue'. A footer bar contains links for '[Page]', '[Missing texts]', '[Update texts]', '[D]', '\$', '[V]', '[E]', '[No configuration context audit]', '[Site map]', and '[Legal mentions]'.

1. Click **View as Supplier** to review the Opportunity from the Supplier perspective.



2. In the **Preview** window, review the Supplier preview.
3. Click the **X** to close the Preview window.

Approvals



1. Click the **Approvals** tab.
 - a. Select **No** or **Yes** for **Legal Consultation required**.
If **No**, provide a **Reason** in the text box.
 - b. Select **No** or **Yes** for **Risk Management approval required**.
If **No**, provide a **Reason** in the text box.
If **Yes**, enter the name of the approver.



[Approvals](#)



Buyers may see different approval needs depending on the Opportunity Type. Additionally, Buyers may not see the Approvals or Approval Workflow tab for their Opportunity Type, if so, progress to [Step 3 - Issue an Opportunity](#).

BRITISH COLUMBIA BCBid

Home Suppliers Sourcing

Sourcing project: BPM017004 - Community Information Tool - Prepare RFx

Validate & Save Ready to Issue

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

Risk Management consultation required ⓘ*

No
 Yes

Reason*
N/A

Have you obtained Expense Authority approval? ⓘ* Please attach PDF from E-approvals, or other documentation of EA approval.

No
 Yes

Click or Drag to add a file*

eApprovals.pdf

Reason

Risk Management consultant ⓘ

Procurement Services Branch approver ⓘ

Engage with the Procurement and Supply Division, Ministry of Citizens' Services in the planning phase if:

- (i) the procurement involves goods with an estimated value equal to or above \$10,000;
- (ii) the procurement involves services with an estimated value equal to or above \$250,000;
- (iii) the procurement impacts or involves multiple ministries;
- (iv) the procurement is high risk; or
- (v) a customized solicitation template is required, including negotiated processes or joint solutioning.

[Page] [Missing texts] [Update texts] [D] [\$] [V] [E] [No configuration context audit] [Site map] [Legal mentions]

- c. Select **No** or **Yes** for **Expense Authority approval required**. If **No**, provide a Reason in the text box. If **Yes**, attach PDF from E-approvals or other documentation of EA approval using the **Click or Drag to add a file** button.
 - d. If required, indicate the **Risk Management consultant** by selecting the name from the drop-down list.
2. Click **Validate & Save**.

Step 3 – Issue an Opportunity

The screenshot shows the BCBid Sourcing project interface for 'Sourcing project: BPM017004 - Community Information Tool - Prepare RFx'. The 'Approval Workflow' tab is active, displaying a flowchart. The flowchart starts with a 'Launch' box, leading to a 'Check if no approvals' diamond. From there, it branches into three paths: 'Legal?', 'Risk Management?', and 'Expense Authority?'. Each path has a corresponding 'Approval' box (e.g., 'Legal Consultation', 'Risk Management Approval', 'Expense Authority Approval') and a 'processed' box (e.g., 'Legal processed', 'Risk Management processed', 'Expense Authority processed'). All paths converge at an 'Approved for Launch' box. A green 'Ready to Issue' button is highlighted with a circled '1'.

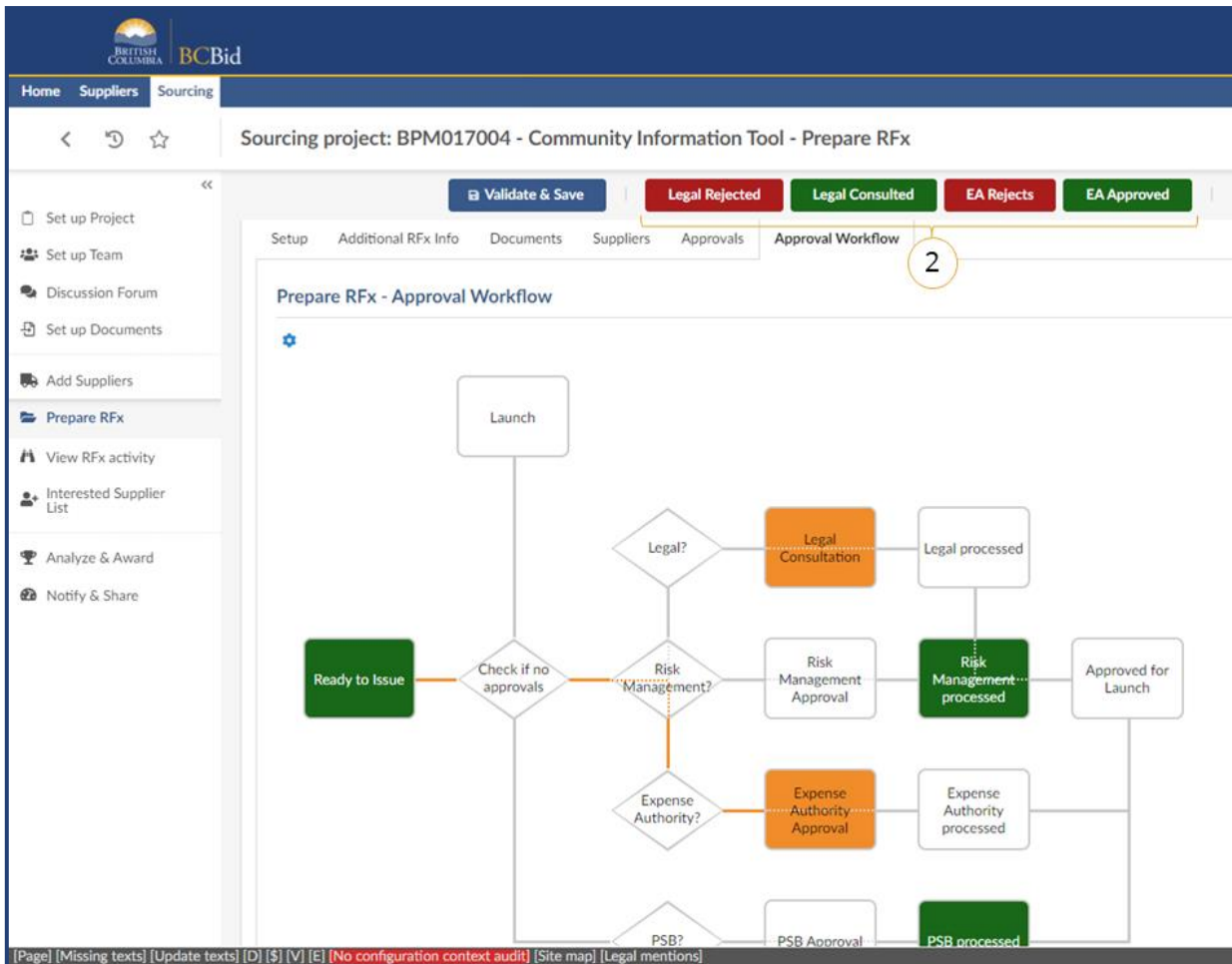
1. Click **Ready to Issue**.



[Approvals Workflow and Issuing an Opportunity](#)



If, on the **Prepare RFx – Setup** tab, **Auto issuing** was selected then there will be no **Ready to Issue** button. The Opportunity will be posted at the selected Issue Date and time.



2. Click the applicable approvals or reject buttons.



A Buyer may have more **Approved** buttons to accept prior to issuing. Selecting **Rejects** will return the Sourcing Project to draft.

The screenshot displays the 'Prepare RFX - Approval Workflow' interface. At the top, there are navigation buttons: 'Validate & Save', 'Reject', 'All approvals complete' (highlighted with a circled '3'), and 'Other Actio'. Below this, a breadcrumb trail shows 'Setup', 'Additional RFX Info', 'Documents', 'Suppliers', 'Approvals', and 'Approval Workflow'. The main area contains a flowchart with the following steps:

- Launch** (Start)
- Check if no approvals** (Decision)
- Legal?** (Decision)
 - Legal Consultation (Task)
 - Legal processed (Status)
- Risk Management?** (Decision)
 - Risk Management Approval (Task)
 - Risk Management processed (Status)
- Expense Authority?** (Decision)
 - Expense Authority Approval (Task)
 - Expense Authority processed (Status)
- Approved for Launch** (Final Status)

The flowchart also includes a 'Ready to Issue' status box and a 'Check if no approvals' decision box that leads to the 'Approved for Launch' status.

3. Click **All approvals complete**.

1017004 - Community Information Tool - Prepare RFx

Validate & Save | Return to Draft status | Create a new lot | Issue Opportunity

risk * are mandatory. All times are displayed as Pacific Time.
your selections

View as Supplier

Community Information Tool (Pre-
Info Documents Suppliers Approvals Approval Workflow

Approval Workflow

Launch

Legal?

Legal Consultation

Legal processed

Check if no approvals

Risk Management?

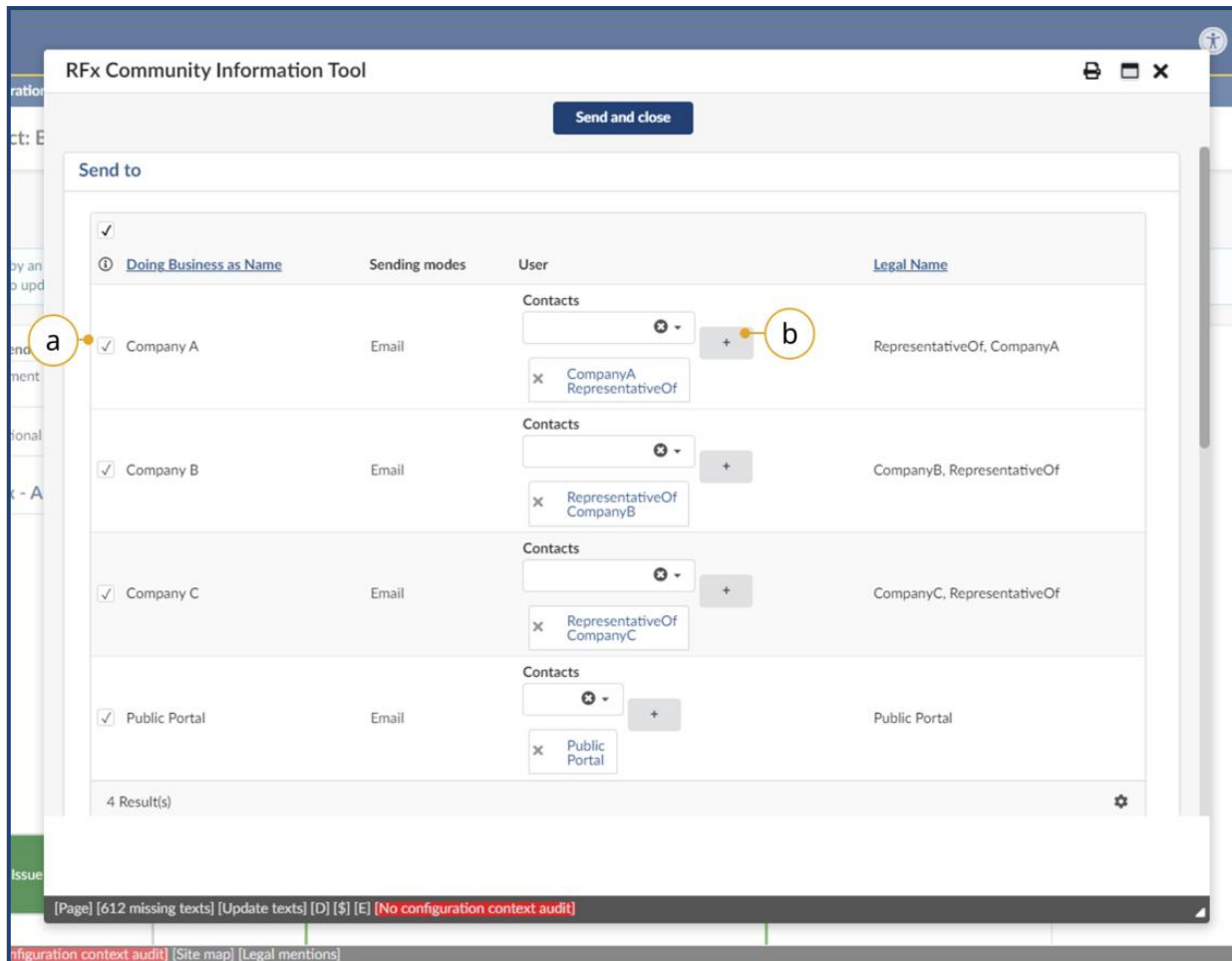
Risk Management

Risk Management

Approved for Launch

context audit | Site map | Legal mentions

- 4. Click **Issue Opportunity** to open a new window.
- 5. Click **View as Supplier** to review the Opportunity from the Supplier perspective.

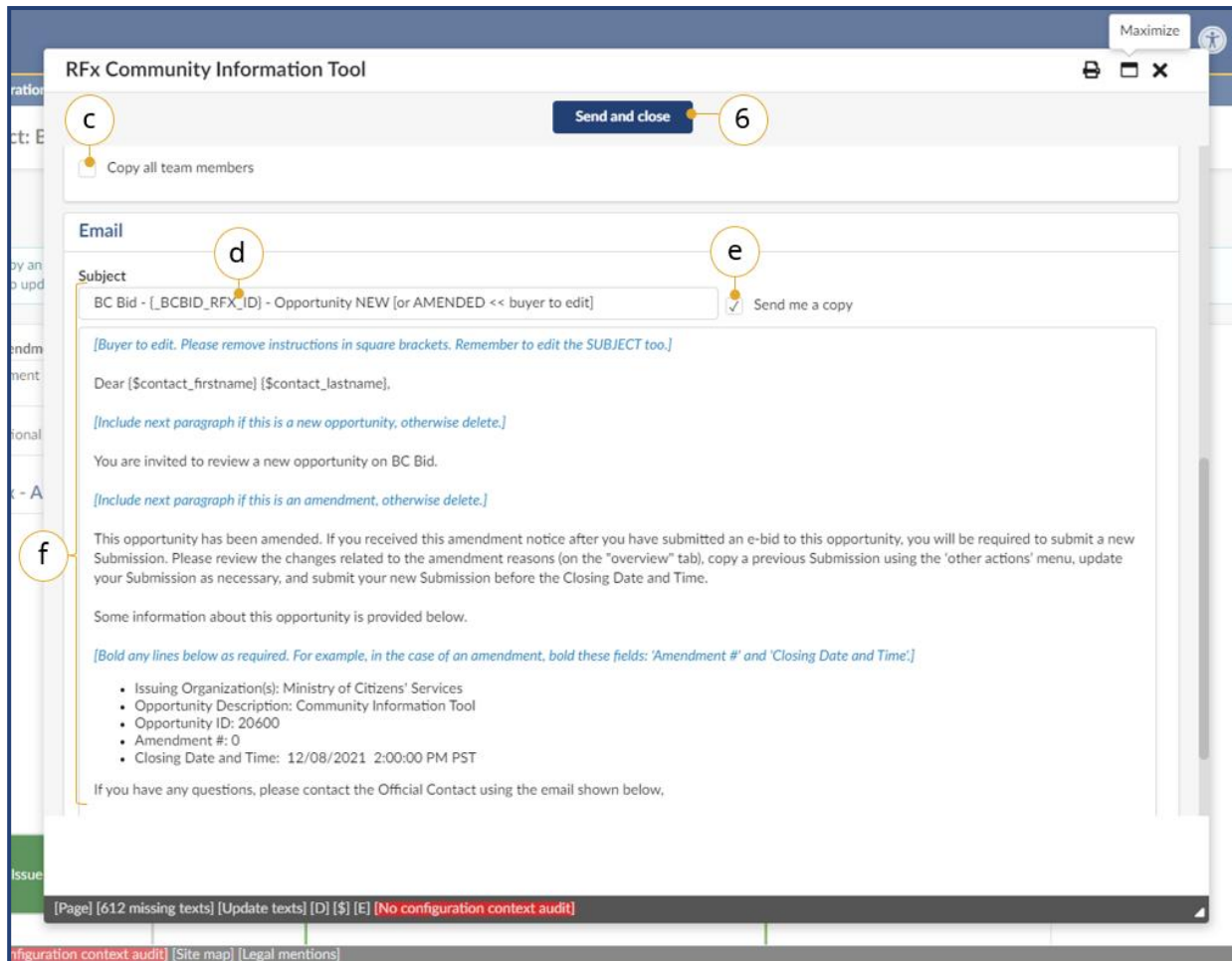


- a. *Optional:* In the pop-up window, review the invited Suppliers and select or unselect the **checkbox** to ensure an invitation is sent.
- b. *Optional:* In the User column, select the **+** icon if a contact is needed.

Note: The system requires all Suppliers to have at least 1 contact added. If a contact is missing the Buyer will be unable to remove the Supplier or add contacts to other Suppliers.



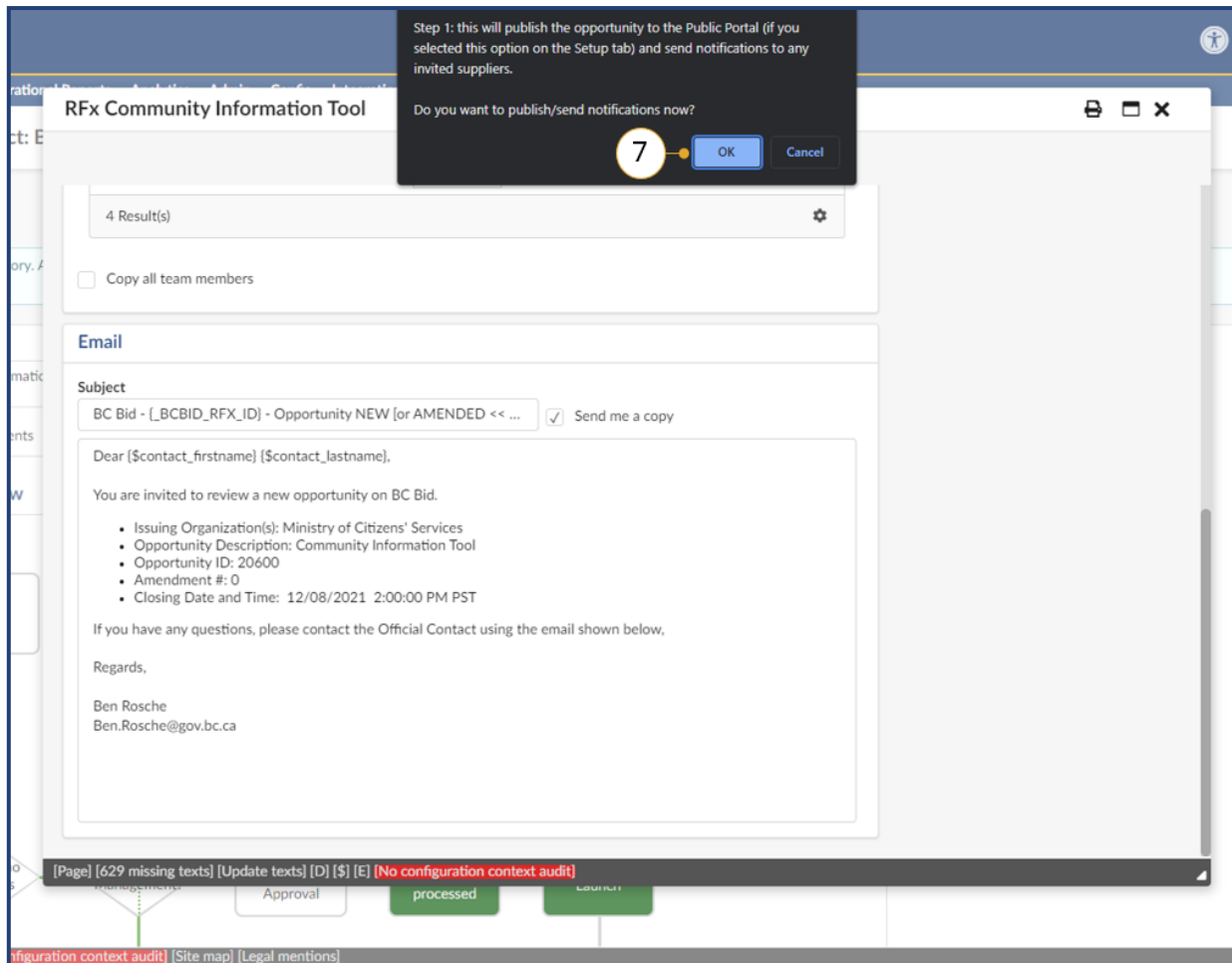
If a public opportunity and no invited suppliers are part of the process you must still send the notification to the Public Portal.



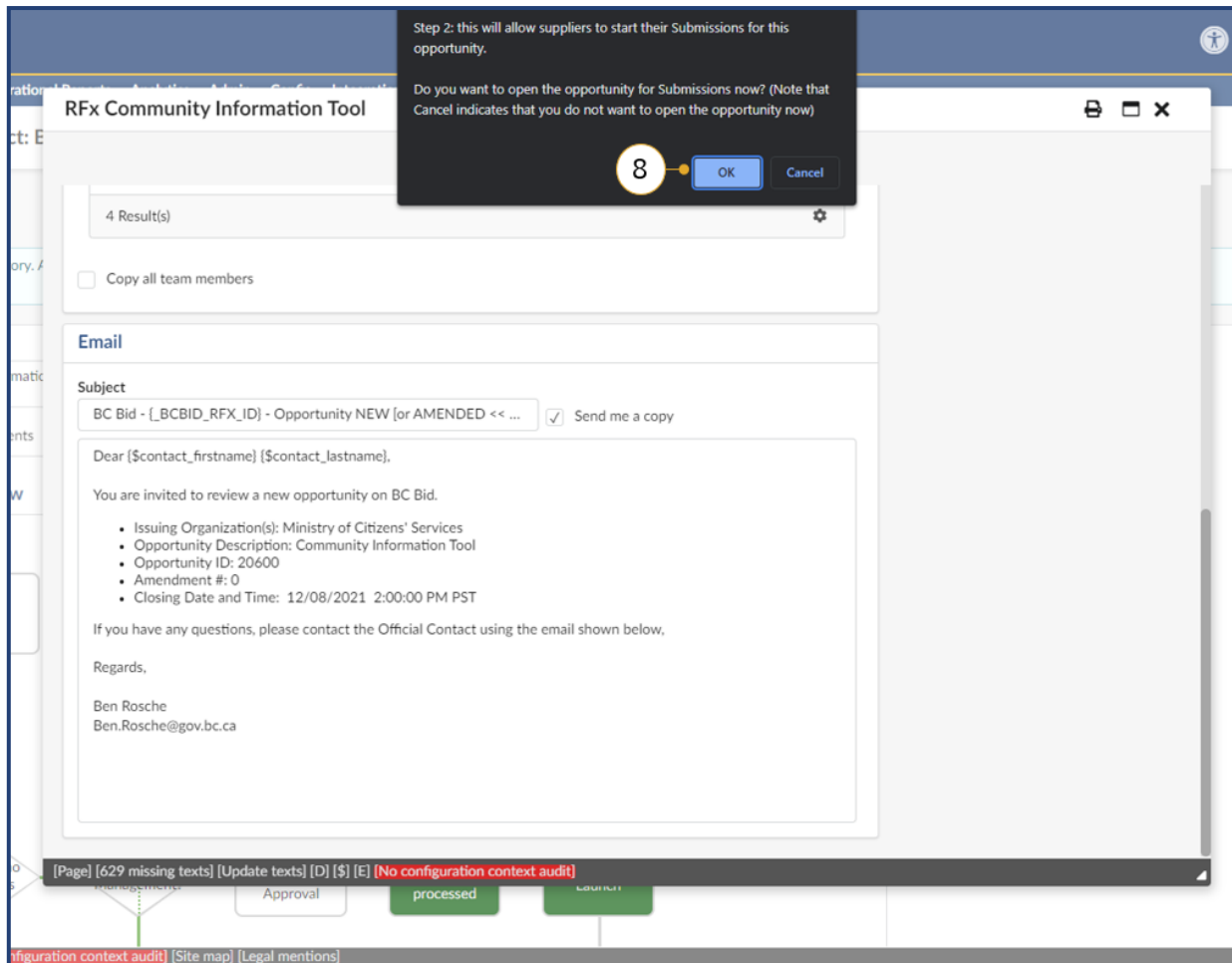
- c. *Optional:* Click the **Copy all team members** checkbox to send the invitation to all team members.
 - d. In the **Subject** textbox, review the subject name and make the applicable edits.
 - e. *Optional:* Click the **Send me a copy** checkbox to receive a copy of the invitation.
 - f. Review the email and make edits following the **Blue** text instructions, then deleting the blue text. **Note:** Bracketed content in the salutation will be autopopulated so do not edit.
6. Select **Send and close**.



Issuing Organization(s) shows both the Issued By and Issued For organizations. The Buyer may choose to separate the two prior to posting.



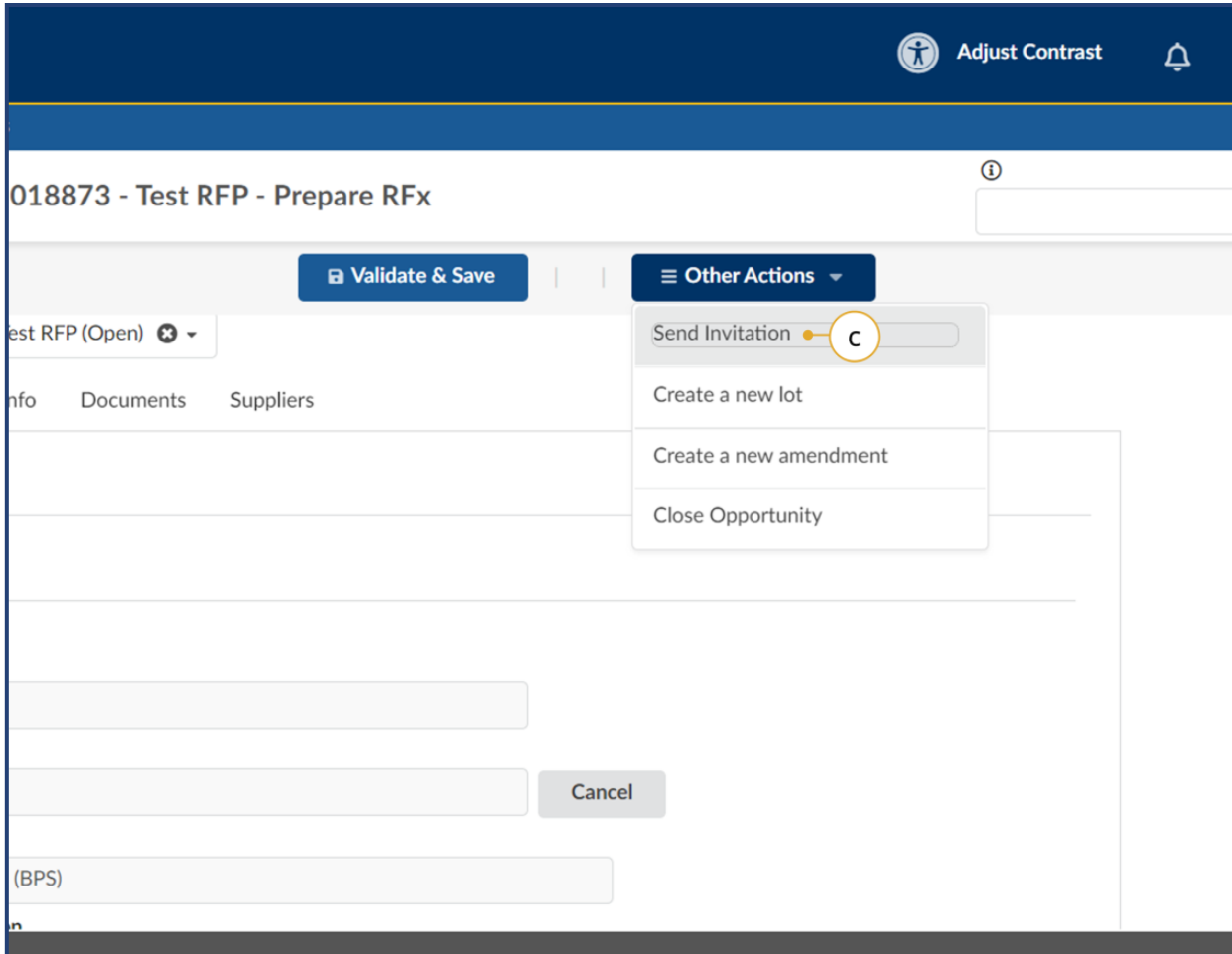
7. Click **OK**.



8. Click **OK**.

Step 4 – Manage Open Opportunity

Inviting Suppliers to an Open Opportunity



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

RFx RFP for Architect

Home Suppliers Sou

Send and close

Doing Business as Name Sending modes User

Doing Business as Name	Sending modes	User
<input type="checkbox"/> Company A Corp	Email	Contacts Ally Acorn
<input checked="" type="checkbox"/> Company B GP	Email	Contacts Billy Barnacle
<input type="checkbox"/> Public Portal	Email	Contacts Public Portal

3 Result(s)

Opportunity ID
20117

[Site map] [Legal mentions]

- 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 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 cause Submissions to submit a new Submission.

The screenshot shows the BC Bid Sourcing project interface. The left-hand menu has 'Discussion Forum' highlighted with a circled '1'. The main content area shows a search bar and a table of messages. The 'Compose' button is circled with a 'b', and the first message in the table is circled with an 'a'.

Subject	Messages	Last update (Pacific Time)	Original sender	Last send
Enquiry 1	1 / 1	2021-11-08 12:38:26 PM	CompanyA REPRESENTATIVEOF (Company A)	Company (Compan

1. In the left-hand menu, click **Discussion Forum**.
 - a. To review an Enquiry, select the message in the messages table.
 - b. Click **Compose** to begin the Addendum.



[Issuing an Addendum](#)

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.

- c. 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**.
- d. *Optional:* In the **External Emails** textbox insert an external email, if applicable.
- e. In the **Subject** textbox, enter the subject of the addendum. This is visible on the *Public Portal* and *Supplier Dashboard*
- f. In the second textbox below **Subject**, enter the description / content of the addendum.
- g. *Optional:* Upload documentation related to the addendum. See **Discussion Forum**.
- h. Click **Send** to complete the addendum.



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

Changes to the Closing Date must have an Addendum processed at the same time as a method to notify suppliers of the change. They do not require an Amendment.

The screenshot displays the BC Bid Sourcing interface for a sourcing project titled "BPM009936 - Purchase of Bricks - Prepare RFX". The left-hand navigation menu includes options such as "Set up Project", "Set up Team", "Discussion Forum", "Set up Documents", "Add Suppliers", "Prepare RFX" (highlighted with a circled '1'), "View RFX activity", "Interested Supplier List", "Analyze & Award", and "Notify & Share". The main content area shows the "Prepare RFX - Setup" page with various fields and tabs. The "RFX Settings" section is circled with a '2' and includes the following fields:

- Opportunity ID: 13418
- RFX Status: Open (with a "Cancel" button)
- RFX Type: Invitation to Quote
- RFX Name: Purchase of Bricks
- Lot #: 1
- Amendment #: 1
- Amendment reason: Update item quantities and extend closing date
- Estimated Amount (CAD): 150,000.00

At the bottom of the page, there is a note: "Requests for IM/IT services of \$500,000 or more and requests for goods over \$5,000 must be competed through the Procurement Services Branch (PSB). PSB must also review requests for goods over \$100,000 and \$500,000." The "Category" field is partially visible at the bottom.

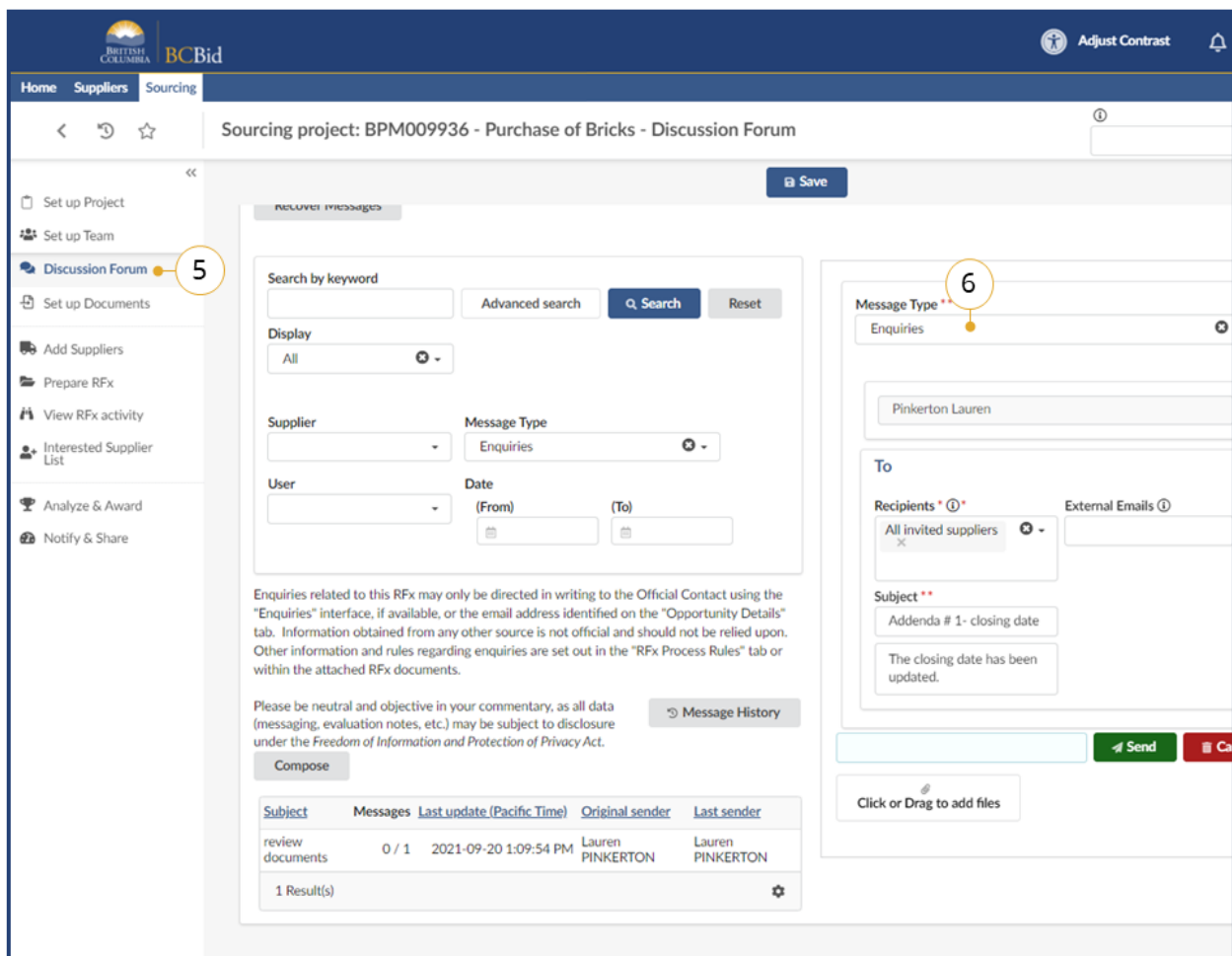
1. On the left-hand menu, click **Prepare RFX**.
2. Click the **Setup** tab.

The screenshot displays the BC Bid Sourcing interface for a project titled "Sourcing project: BPM009936 - Purchase of Bricks - Prepare RFx". The page is divided into a left-hand navigation menu and a main content area. The navigation menu includes options such as "Set up Project", "Set up Team", "Discussion Forum", "Set up Documents", "Add Suppliers", "Prepare RFx", "View RFx activity", "Interested Supplier List", "Analyze & Award", and "Notify & Share". The main content area is titled "Summary Details" and contains the following sections:

- Summary Details:** Purchase of Bricks
- Issue Date and Closing Date (times are shown in Pacific Time):**
 - Issue Date:** 2021-09-24 10:34:43 AM. Includes an "Auto issuing" checkbox.
 - Closing Date & Time:** 2021-10-21 2:00:00 PM. Includes an "Auto closure" checkbox.
 - Amendment Date & Time:** 2021-09-28 7:49:45 AM.
 - Enquiries Deadline:** 12:00:00 AM.
- RFx to be pre-advertised:**
- NDA required from Suppliers:**
- Visible to Public:** Post this opportunity publicly?
- Sealed Submissions:** (Section header)

Annotations on the screenshot include a yellow circle with the number "3" pointing to the "Closing Date & Time" field, and a yellow circle with the number "4" pointing to the "Validate & Save" button at the top right of the main content area.

3. Update the **Closing Date & Time**.
Optional: At this time enquiries deadline can also be changed without creating a new amendment.
4. Click **Validate & Save**.



5. On the left-hand menu, click **Discussion Forum**.
6. Proceed with creating an addendum to notify suppliers of the change in closing date. See [Addendum](#) section for more information.



Changes to Main Commodity or Other Commodities will require the posting of an Addendum as well.

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 to the Opportunity.

The screenshot displays the BC Bid Sourcing interface for a sourcing project. The left-hand menu has a '1' next to the 'Prepare RFX' icon. The top navigation bar shows 'Home', 'Suppliers', and 'Sourcing'. The main content area has a 'Validate & Save' button and an 'Other Actions' dropdown menu. The 'Other Actions' menu is open, showing options: 'Send Invitation', 'Create a new lot', 'Create a new amendment' (highlighted with a 'b'), and 'Close Opportunity'. The 'Setup' tab is selected, and the 'RFx Settings' section contains the following fields:

- Opportunity ID: 20600
- RFX Status: Open (with a 'Cancel' button)
- Opportunity Type: Request for Proposal
- RFX Name: Community Information Tool
- Lot #: 1
- Amendment #: 0
- Estimated Amount (CAD): 250,000.00
- Category: [Empty]

1. In the left-hand menu, click **Prepare RFX**.
 - a. Navigate to the **Setup** tab.
 - b. From the **Other Actions** drop-down list select **Create a new amendment**.



[Issuing an Amendment](#)

Project: BPM017004 - Community Information Tool - Prepare RFx

Create a new Amendment/Lot

Create & Close d

Commodity: 81112000 - Data services
 Organization: Ministry of Citizens' Services

Program: Templates only

Opportunity Type	Lot #	Amendment #	Opportunity Description	Issue Date	Closing Date	RFx Status
Request for Proposal	1	0	Community Information Tool	2021-11-08	2021-12-08	Open

1 Result(s)

Copy Options

Choose what to copy

Blank
 Default from RFx Type
 Copy from selected RFx C

[Page] [629 missing texts] [Update texts] [D] [\$] [E] [No configuration context audit]

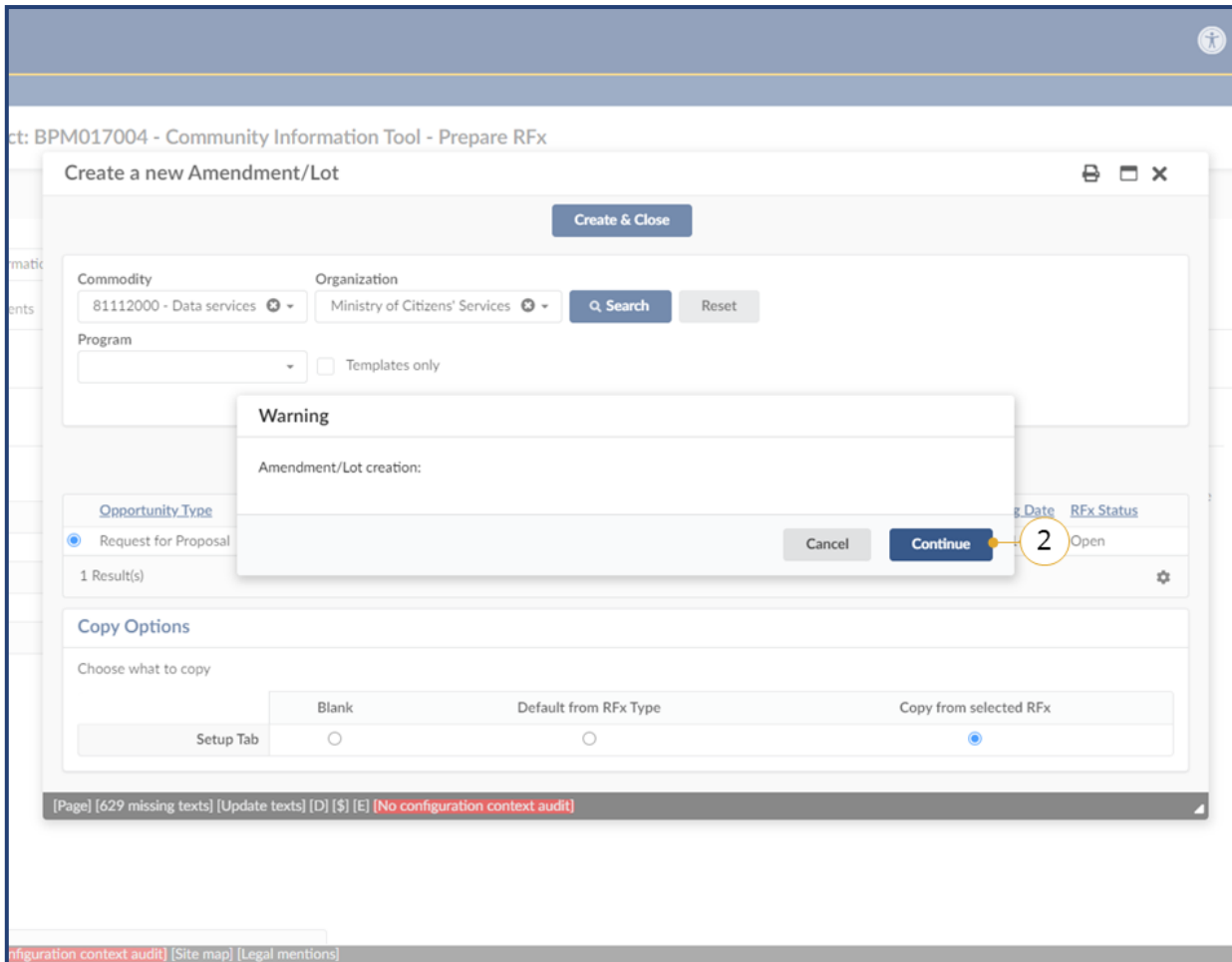
configuration context audit [Site map] [Legal mentions]

- c. In the **Create a new Amendment/Lot** window, select **Copy from selected RFx**.
- d. Click **Create & Close**.



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

2. Click **Continue**.



Creating an amendment will cause any Submissions already received to be rejected, requiring vendors to resubmit their response. Submission submitted on previous amendment versions will not be able to be evaluated.

Home Suppliers Sourcing

Sourcing project: BPM017004 - Community Information Tool - Prepare RFX

Validate & Save Other Actions

RFX Settings

RFX Status
Draft Withdraw 4

Opportunity Type
Request for Proposal

Opportunity Description*
Community Information Tool

Lot # ①
1

Amendment # ①
1

Amendment reason* 3
Enter the reason for the amendment and list all changes.

Summary Details ①*

The Ministry of Citizens' Services, Connectivity Division, is soliciting for a contractor to enhance our Community Information Tools (CIT) to perform the following activities: Streamline the connectivity projects in BC; integrate connectivity data and other sector-based data into CIT to enable rapid analysis to support investment opportunity identification, connectivity planning design to provide more intuitive features. Budget maximum is \$250K.

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

Issue Date ①
12:00:00 AM Auto issuing ①

[Page] [Missing texts] [Update texts] [D] [S] [V] [E] [No configuration context audit] [Site map] [Legal mentions]

3. After amending the Opportunity, navigate to the **Setup** tab and enter the reason for the amendment in the **Amendment reason** textbox.
4. Click **Validate & Save**.



Do not change the Opportunity ID with an Amendment.

Posting an Amendment

The screenshot shows the BCBid Sourcing project interface for 'Sourcing project: BPM017004 - Community Information Tool - Prepare RFx'. The 'Ready to Issue' button is highlighted with a circled '6'. The interface includes a navigation menu with 'Home', 'Suppliers', and 'Sourcing'. Below the navigation, there are buttons for 'Validate & Save', 'Ready to Issue', and 'Other Actions'. A message box states: 'Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time. Click on save to update your selections'. The main content area shows 'Selected Lot - Amendment*' with 'Lot : 1 - Amendment : 1 - Community Information Tool (Draft)'. The 'Approval Workflow' tab is active, displaying a flowchart with steps: Launch, Legal?, Risk Management?, Risk Management Approval, Risk Management processed, Approved for Launch, and Ready to Issue. The 'Ready to Issue' button is highlighted in orange.

5. Click **Ready to Issue**.



If the Buyer wants to delete the Lot or Amendment they can do so prior to issuing using the **Other Actions** dropdown button.

The screenshot displays the BCBid Sourcing project interface for 'Sourcing project: BPM017004 - Community Information Tool - Prepare RFx'. The top navigation bar includes 'Home', 'Suppliers', and 'Sourcing'. The main content area features a toolbar with buttons for 'Validate & Save', 'Reject', 'All approvals complete', and 'Other Actions'. A notification box indicates that data has been saved and several activities (Expense Authority, Risk Management, PSB, Legal) have been automatically validated. Below this, a 'Selected Lot - Amendment*' section shows 'Lot : 1 - Amendment : 1 - Community Information Tool (Draft)'. The 'Approval Workflow' tab is active, displaying a flowchart with steps: 'Launch', 'Legal?' (decision diamond), 'Legal Consultation', and 'Legal processed' (highlighted in green). A circled '7' points to the 'All approvals complete' button.

6. Select **All approvals complete**.

BRITISH COLUMBIA BCBid

Home Suppliers Sourcing

Sourcing project: BPM017004 - Community Information Tool - Prepare RFx

8

Validate & Save | Return to Draft status | Create a new lot | Issue Opportunity

Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time.
Click on save to update your selections

Selected Lot - Amendment*
Lot : 1 - Amendment : 1 - Community Information Tool (Pre-advertisement) View as Supplier

Setup Additional RFx Info Documents Suppliers Approvals Approval Workflow

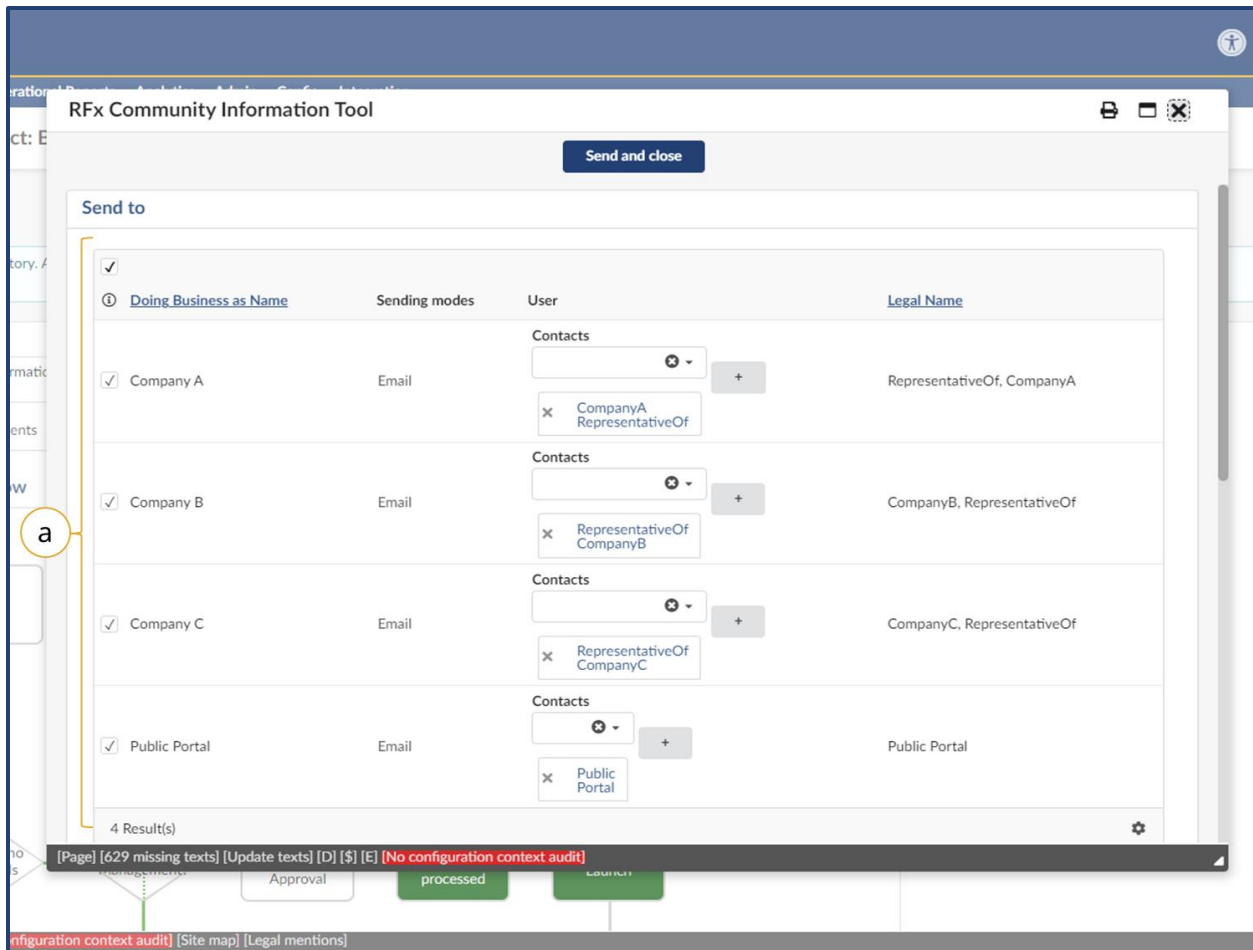
Prepare RFx - Approval Workflow

```

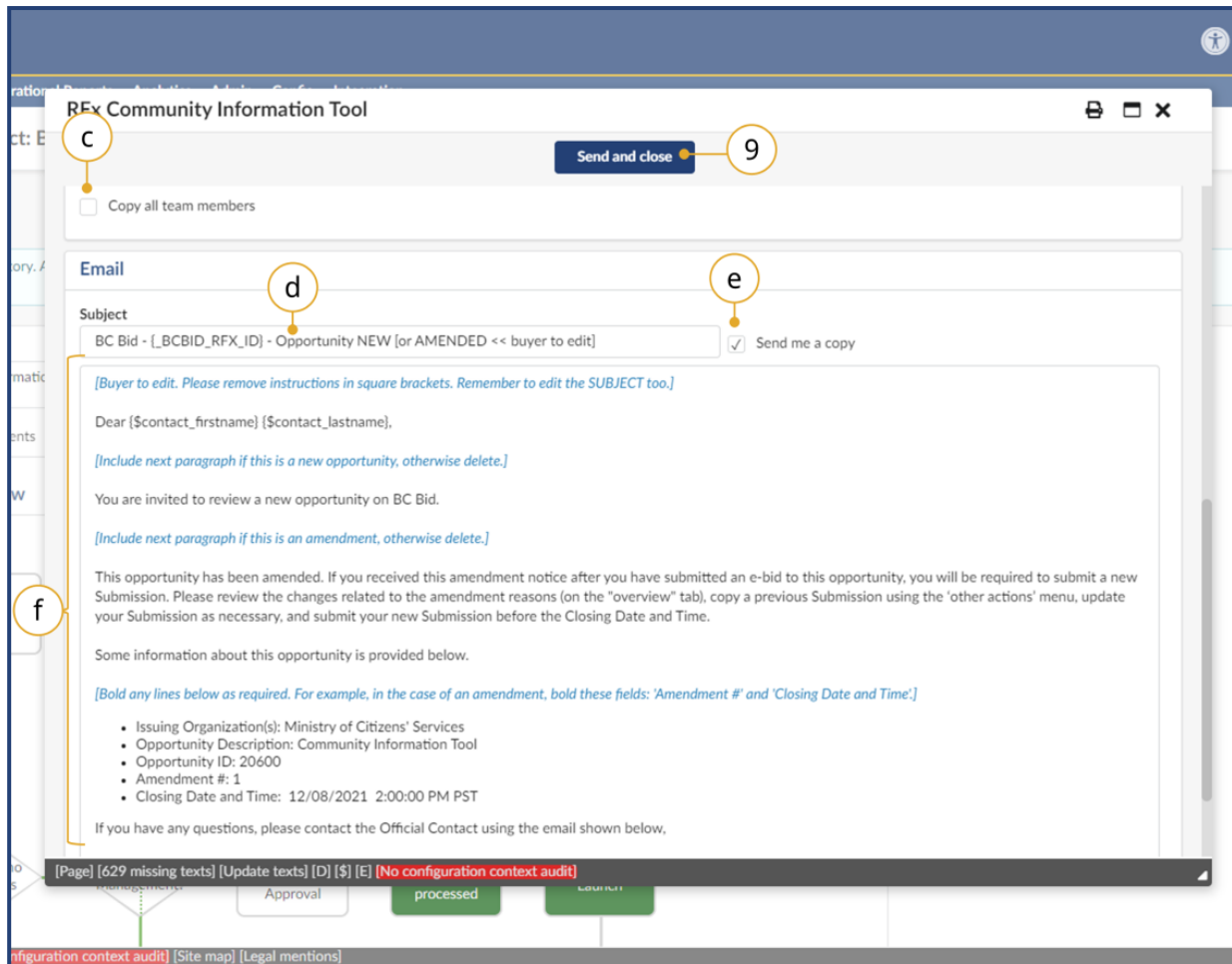
graph TD
    Launch[Launch] --> Check[Check if no approvals]
    Check --> Legal{Legal?}
    Check --> Risk{Risk Management?}
    Legal --> LegalC[Legal Consultation]
    LegalC --> LegalP[Legal processed]
    Risk --> RiskA[Risk Management Approval]
    RiskA --> RiskM[Risk Management processed]
    RiskM --> Approved[Approved for Launch]
    Approved --> Ready[Ready to Issue]
  
```

[Page] [Missing texts] [Update texts] [D] [\$] [V] [E] [No configuration context audit] [Site map] [Legal mentions]

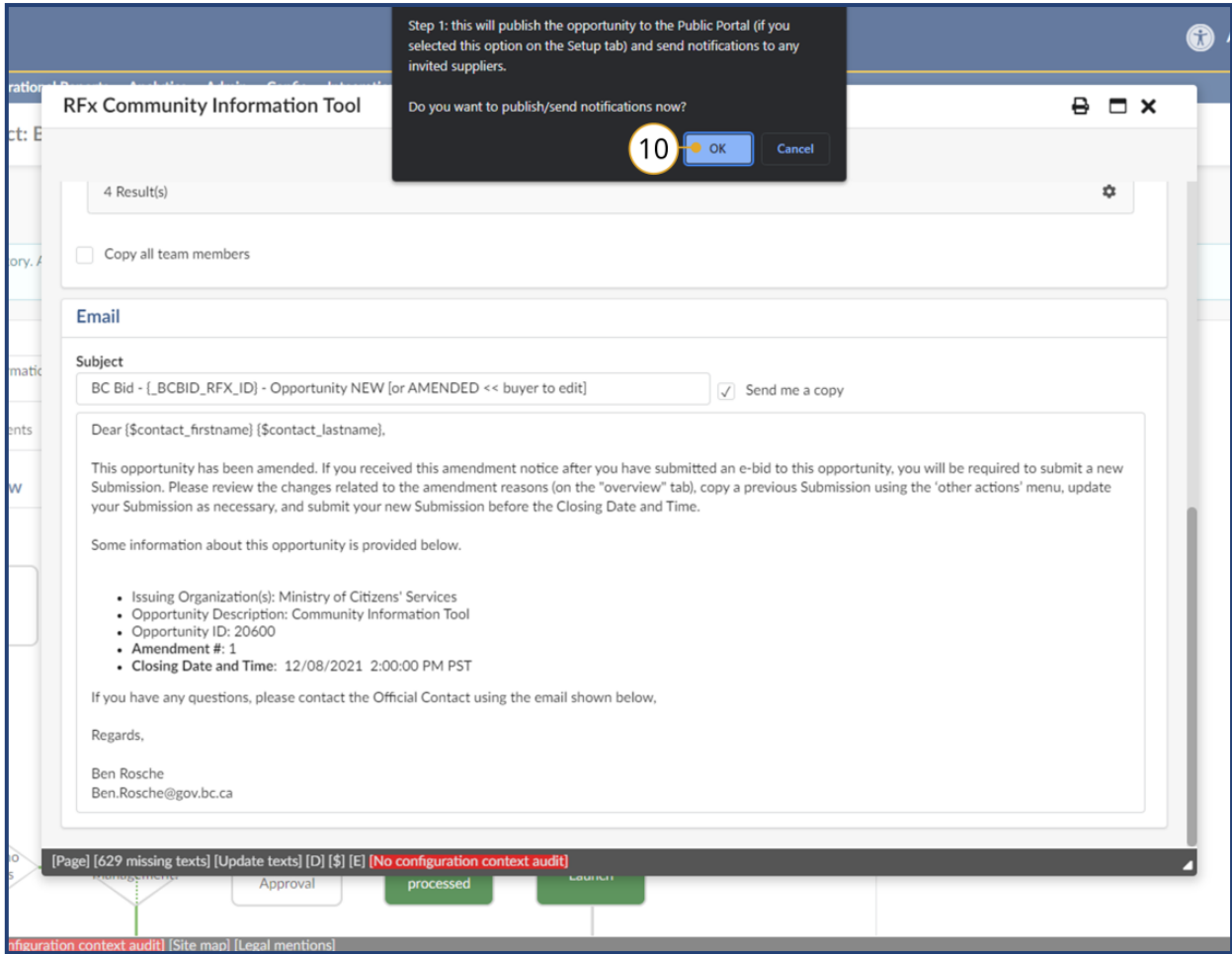
7. Click **Issue Opportunity**.



- a. Suppliers listed will receive email notifications of the amendment.
- Suppliers are listed if they were invited to the opportunity or if they clicked the **Start Submission** button in the Supplier Dashboard.



- b. *Optional:* Click the **Copy all team members** checkbox to send the invitation to all team members.
 - c. *Optional:* In the **Subject** textbox, review the subject name.
 - d. *Optional:* Click the **Send me a copy** checkbox to receive a copy of the invitation.
 - e. Review the email and make edits according to the **Blue** text.
8. Select **Send and close**.



9. Click **OK**.

The screenshot displays the 'RFX Community Information Tool' interface. A dark dialog box is overlaid on top, containing the text: 'Step 2: this will allow suppliers to start their Submissions for this opportunity.' Below this, it asks: 'Do you want to open the opportunity for Submissions now? (Note that Cancel indicates that you do not want to open the opportunity now)'. The dialog has a yellow circle with the number '11' next to an 'OK' button and a 'Cancel' button.

The background interface shows a search result for '4 Result(s)'. Below this is a checkbox labeled 'Copy all team members'. The main content area is titled 'Email' and contains a 'Subject' field with the text 'BC Bid - [_BCBID_RFX_ID] - Opportunity NEW [or AMENDED << buyer to edit]' and a checked checkbox for 'Send me a copy'. The email body starts with 'Dear {\$contact_firstname} {\$contact_lastname}.' and contains the following text: 'This opportunity has been amended. If you received this amendment notice after you have submitted an e-bid to this opportunity, you will be required to submit a new Submission. Please review the changes related to the amendment reasons (on the "overview" tab), copy a previous Submission using the "other actions" menu, update your Submission as necessary, and submit your new Submission before the Closing Date and Time. Some information about this opportunity is provided below.' This is followed by a bulleted list: 'Issuing Organization(s): Ministry of Citizens' Services', 'Opportunity Description: Community Information Tool', 'Opportunity ID: 20600', 'Amendment #: 1', and 'Closing Date and Time: 12/08/2021 2:00:00 PM PST'. The email concludes with 'If you have any questions, please contact the Official Contact using the email shown below.', 'Regards,', and 'Ben Rosche Ben.Rosche@gov.bc.ca'. At the bottom of the interface, there are buttons for 'Approval', 'processed', and 'LOAN IT'. A footer bar contains links for '[Page] [629 missing texts] [Update texts] [D] [\$] [E] [No configuration context audit]', 'configuration context audit', 'Site map', and 'Legal mentions'.

10. Click **OK**.

Toggle Amendment or Lot

The screenshot shows the BC Bid Sourcing project interface for 'Sourcing project: BPM018644 - Community Information Tools - Prepare RFX'. The 'Selected Lot - Amendment*' dropdown menu is open, showing options: 'Lot : 2 - Amendment : 0 - (Draft)', 'LOT : 1', 'Lot : 1 - Amendment : 0 - Community Information Tools (Closed)', 'Lot : 1 - Amendment : 1 - Community Information Tools (Open)', and 'LOT : 2'. A red circle with the number '1' highlights the dropdown arrow. Below the dropdown, there are tabs for 'Approvals' and 'Approval Workflow'. A yellow warning banner states: '- All Mandatory fields must have a value' and '- Fill in mandatory fields in the Approvals tab'. The 'RFX Settings' section includes fields for 'RFX Status' (Draft), 'Opportunity Type*' (Request for Proposal), 'Opportunity Description*', 'Lot # ①' (2), 'Amendment # ①' (0), and 'Summary Details ①*'. A 'Withdraw' button and a 'Template' checkbox are also visible.

1. To toggle between amendments or lots choose the amendment or lot using the **Selected Lot – Amendment** dropdown.



See [Create New Lot](#) for guidance on creating a new lot.

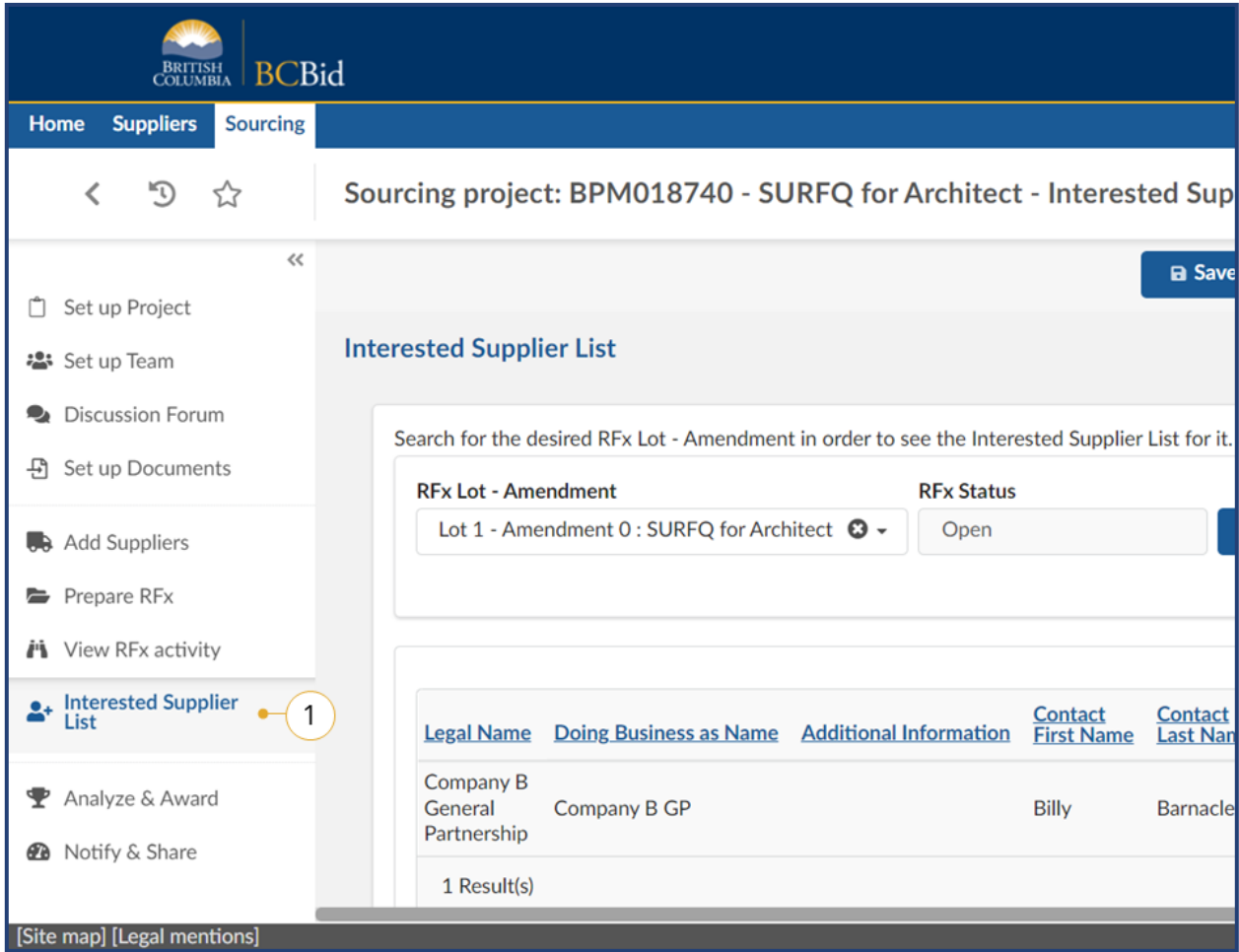
Amending a Qualified Supplier List Generating Opportunity

Buyers and Suppliers should be aware that when a multiuse list opportunity is amended the old version is closed and the Suppliers will see the amended version in their manage submissions queue. It will not impact their shortlisted status if a Supplier has already qualified, but because 'closed' versions of any opportunity are filtered out they'll see the amended version of the opportunity and it will look like they have not submitted anything. Suppliers can change the filters to see the old version of the opportunity.

To reassure the Suppliers, Buyers should contact the qualified suppliers to tell them that they are still shortlisted even though there was an amendment and it looks like they have not submitted/qualified.

Additionally, Buyers should add the Suppliers they want to the new version of the opportunity using the offline submission route. This will ensure the Supplier browse screen shows the suppliers did have submissions to that opportunity and are still shortlisted. This also ensures the Buyer has a view showing all shortlisted suppliers in the same list rather than spread across multiple versions of the opportunity. Anyone using the list in a downstream opportunity will see the full list imported into their opportunity, so this doesn't impact them.

Interested Supplier List



1. *Optional:* In the left-hand menu, click **Interested Supplier List** to review the list of suppliers who have joined the list of interested suppliers for this opportunity.

Note: This step is applicable only if the publicly available Interested Supplier List used for this RFX checkbox was checked in the Setup tab.

Review NDA

The screenshot shows the BCBid Sourcing project interface. The left-hand menu is visible, with the 'View RFX activity' option highlighted and circled with a '1'. The main content area displays the 'Submissions' tab for a sourcing project titled 'BPM084508 - Test Opportunity - Timber Auction - V'. A 'Refresh' button is present, with a tooltip that reads: 'Select the 'Refresh' button to update "Submission Available" column.' Below this, there is a section for 'Lot : 1 - Test Opportunity - Timber Auction (Amendment 0)' which is 'Open - Open for Submissions From: 2022-01-31 To: 2022-01-31 00h 23min 15s'. A table lists the submission details:

Supplier	DBA	Email	Logins	Last login (Pacific Time)	Non-Disclosure
Company A Corporation	Test123		1	2022-01-31 10:06:37 AM	Submitted on 10:06:34 AM

Below the table, it indicates '1 Result(s)' and a message: 'All Submissions are sealed. The person in the Responsible role can unseal the Submissions.'

1. In the left-hand menu, click **View RFX activity**.

Note: This step is applicable only if the NDA required from Supplier's checkbox was selected in Prepare RFX - Setup tab.

Adjust

Project: BPM084508 - Test Opportunity - Timber Auction - View RFX activity

Save

Submissions Evaluations

Refresh Select the 'Refresh' button to update "Submission Available" column.

Lot : 1 - Test Opportunity - Timber Auction (Amendment 0)

Open - Open for Submissions From: 2022-01-31 To: 2022-01-31 00h 23min 15s

Supplier	DBA	Email	Logins	Last login (Pacific Time)	Non-Disclosure Agreement	Submissions	Declined	Co
Company A Corporation	Test123		1	2022-01-31 10:06:37 AM	Submitted on 2022-01-31 10:06:34 AM (Pacific Time)	2		

1 Result(s)

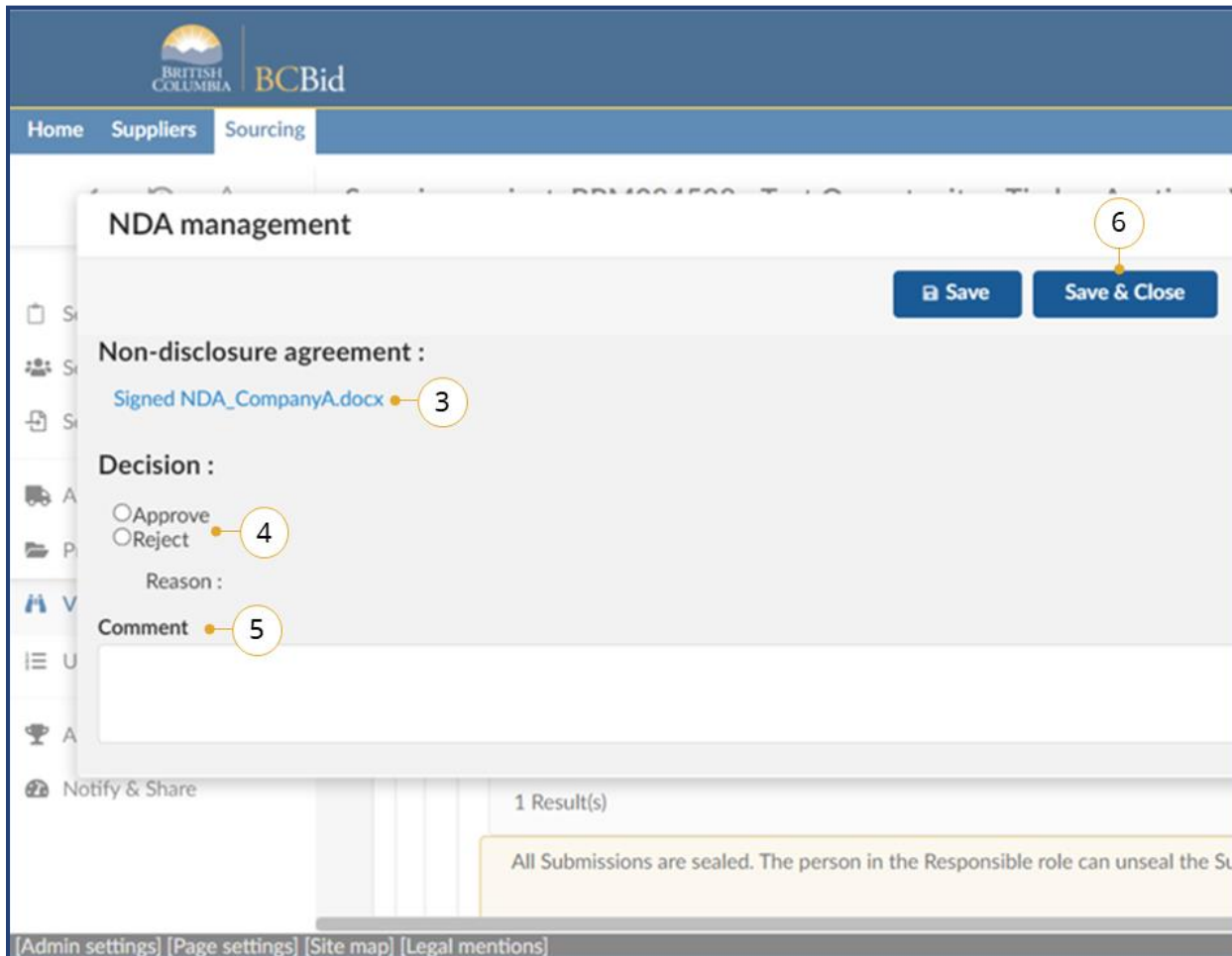
All Submissions are sealed. The person in the Responsible role can unseal the Submissions after 2022-01-31 10:30:00 AM (P

Legal mentions]

- Click the NDA submission under the **Non-Disclosure Agreement** column.



If the Non-Disclosure Agreement column is not visible, select the Cog icon in the lower right corner of the table. Once selected, the user can change which columns are visible.



3. Download the **Non-disclosure agreement**.
4. Select **Approve** or **Reject**.
5. Enter a **Comment** if NDA submission is rejected.
6. Click **Save & Close**.

Upload Submissions to Open Opportunities

To upload a Submission received by hard-copy or email for open opportunities, such as the Request for Information, or Multi-Use List, follow the steps identified in [Adding Suppliers Not on a Qualified List](#) prior to the steps in this section. This section is not for contract-resulting Opportunities.

The screenshot displays the BC Bid Sourcing interface for a project titled "Sourcing project: BPM084997 - Skills Training and Employment Program [2022-03-01...". 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", and "Analyze & Award". The "Prepare RFX" option is highlighted with a circled "1". The main content area shows the "Prepare RFX - Setup" tab, which includes a "Selected Lot - Amendment*" section with a search bar and a "View as Supplier" link. Below this, there are tabs for "Setup", "Additional RFX Info", "Documents", "Suppliers", "Approvals", and "Approval Workflow". The "Setup" tab is active, showing "RFX Settings" with the following fields: "Opportunity ID" (155780), "RFX Status" (Open), "Opportunity Type" (Multi-Use List), "Opportunity Description" (Skills Training and Employment Program [2022-03-01]), "Lot # ①" (1), and "Amendment # ①" (0). A "Cancel" button is located next to the "RFX Status" field. At the top right of the main content area, there are buttons for "Save and Close", "Validate & Save" (circled with a "2"), and "Other Actions". A warning message states: "The ability to edit the RFX is limited when not in Draft status." Below this, a note indicates: "Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time. Click on save to update your selections."

1. After adding the Supplier on the add Supplier tab, navigate to the **Prepare RFX – Setup** tab.
2. Click the **Validate & Save** button.
3. Complete the steps identified in the [Upload Submissions](#).

Note: If the Validate & Save button is not selected “NA” will appear on the View RFX activity.



[Upload Submissions for Open Opportunities](#)

Cancel an Issued Opportunity

The screenshot shows the BC Bid Sourcing interface for a sourcing project titled "BPM085220 - Community Information Tool - Prepare RFX". The left sidebar contains navigation options such as "Set up Project", "Set up Team", "Discussion Forum", "Set up Documents", "Add Suppliers", "Prepare RFX", "View RFX activity", "Interested Supplier List", "Analyze & Award", and "Notify & Share". The main content area is titled "Sourcing project: BPM085220 - Community Information Tool - Prepare RFX" and includes buttons for "Save and Close", "Validate & Save", and "Other Actions". A warning message states: "The ability to edit the RFX is limited when not in Draft status." Below this, a note indicates that fields marked with an asterisk are mandatory and that times are displayed as Pacific Time. The "Selected Lot - Amendment*" section shows "Lot : 1 - Amendment : 0 - Community Information Tool (Open)". The "Prepare RFX - Setup" tab is active, displaying the "RFX Settings" section. The "Opportunity ID" is 156089, "RFX Status" is Open, and "Opportunity Type" is Request for Proposal. The "Opportunity Description" is "Community Information Tool". The "Lot #", "Amendment #", and "Estimated Amount (CAD)" are 1, 0, and 250,000.00 respectively. A "Cancel" button is highlighted with a circled "1".

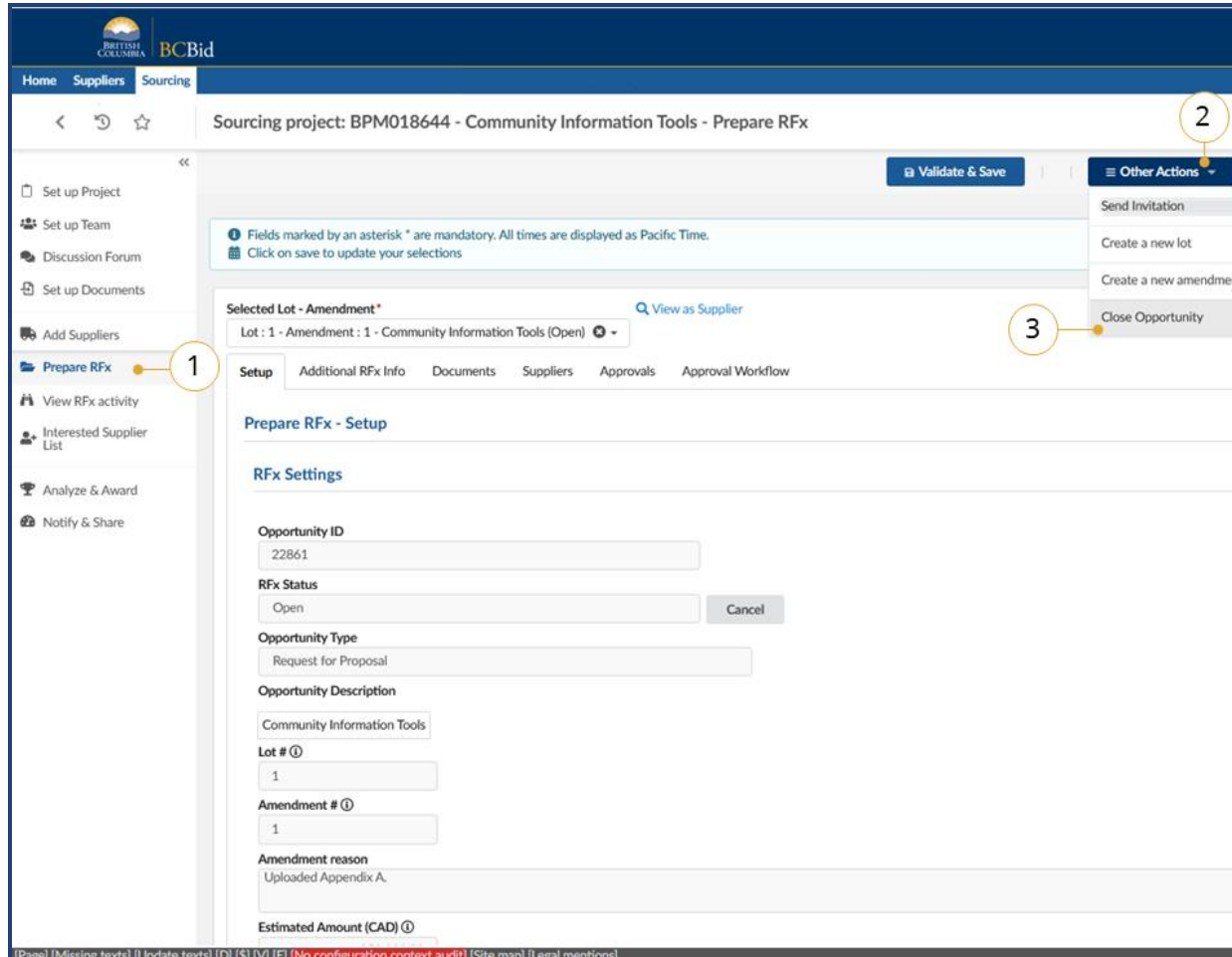
1. On the Prepare RFX – Setup tab click the **Cancel** button.

The screenshot shows the BC Bid Sourcing interface for project BPM085220. A confirmation dialog box is open, asking: "Are you sure you want to Cancel this RFX? Click OK to Cancel the RFX and Cancel to keep the RFX in its current state. The RFX Cancel action cannot be undone." The "OK" button is circled with a yellow "2". The background interface includes a navigation menu on the left, a top navigation bar with "Home", "Suppliers", and "Sourcing", and a main content area with tabs for "Setup", "Additional RFX Info", "Documents", "Suppliers", "Approvals", and "Approval Workflow". The "Setup" tab is active, showing "Prepare RFX - Setup" with fields for Opportunity ID (156089), RFX Status (Open), Opportunity Type (Request for Proposal), Opportunity Description (Community Information Tool), Lot # (1), Amendment # (0), and Estimated Amount (CAD) (250,000.00). A warning message at the top states: "The ability to edit the RFX is limited when not in Draft status." Below that, a note says: "Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time. Click on save to update your selections." At the bottom of the page, there is a footer with various links: "[Page] [Missing texts] [Update texts] [Admin settings] [Page settings] [D] [S] [V] [E] [No configuration context audit] [Site map] [Legal mentions]".

2. Click the **OK**.

Step 5 – Opportunity Close

Manual Close of Opportunity



1. In the left-hand menu, click **Prepare RFX**.
2. Click the **Other Actions** dropdown button.
3. Click **Close Opportunity**.

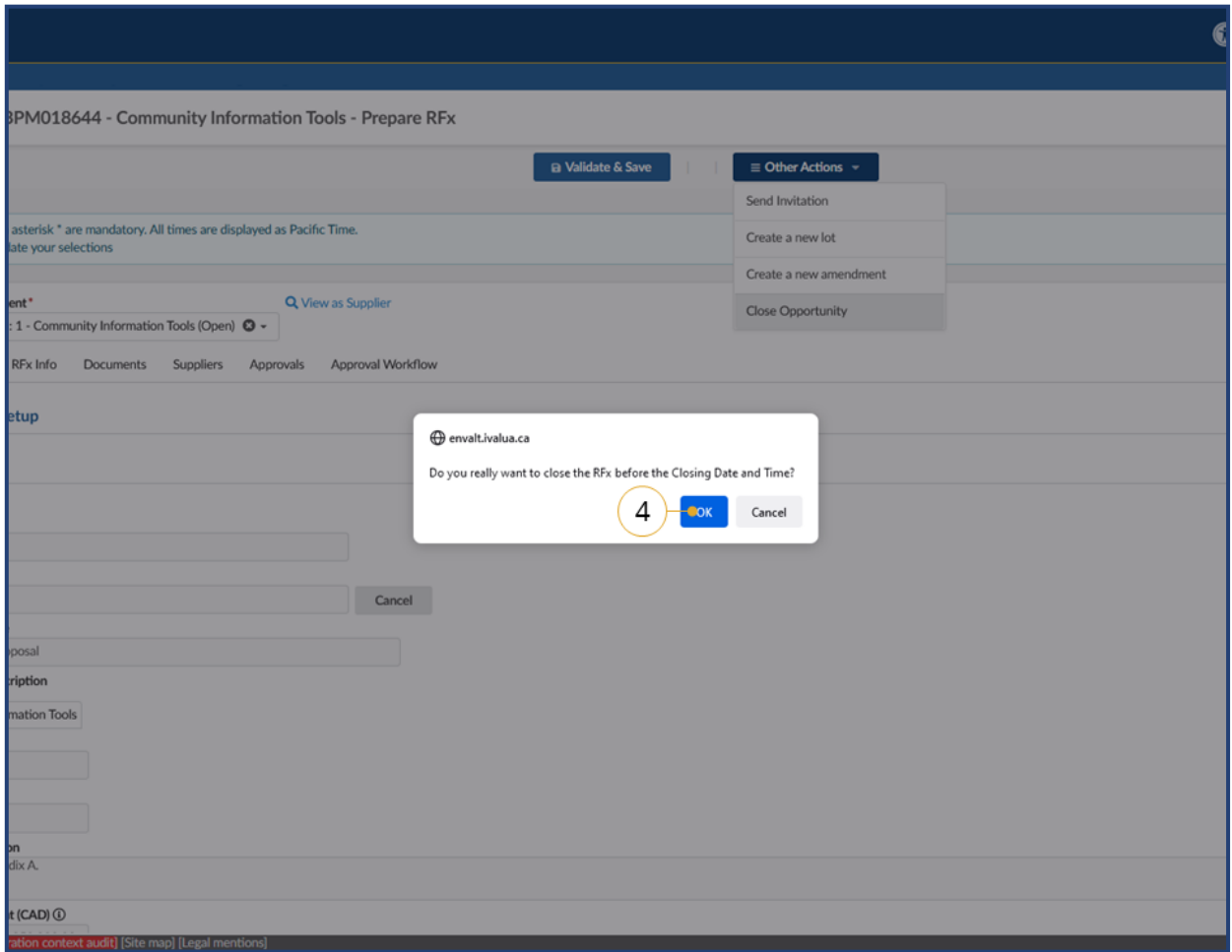
This section is here for training to allow trainers to upload Submissions during practice.



[Manually Close a Posted Opportunity](#)



Manual closure of opportunities is available and should be used in accordance with core policy and best practices. This function is not recommended for use.



4. Click **OK**.

Upload Submissions

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

4 Refresh Select the 'Refresh' button to update "Submission Available" column.

1 View RFX activity

3 +

2 Declined

Lot : 1 - Community Information Tool (Amendment 0)

Closed - Open for Submissions From: 2022-01-11 To: 2022-01-11

Supplier	DBA	Email	Logins	Last login (Pacific Time)	Non-Disclosure Agreement	Submissions	Declined	Comment
Company A Corporation	Company A Corp					+	<input type="checkbox"/>	
Company B General Partnership	Company B GP					+	<input type="checkbox"/>	
Company C Sole Proprietor	Company C SP					+	<input type="checkbox"/>	

3 Result(s)

All Submissions are sealed. The person in the Responsible role can unseal the Submissions after 2022-01-11 11:45:09 AM (Pacific Time) from

1. Using the left-hand menu, click **View RFX Activity**.
2. Select the **Declined** checkbox to track all invited Suppliers who did not provide a Submission.
3. Click the **+** button in the row of the Supplier whose Submission is being added.
4. Click the **Refresh** button to update the Submission Available Confirm with "Refresh" column. This is a way to confirm that the Submission was uploaded by the Buyer.

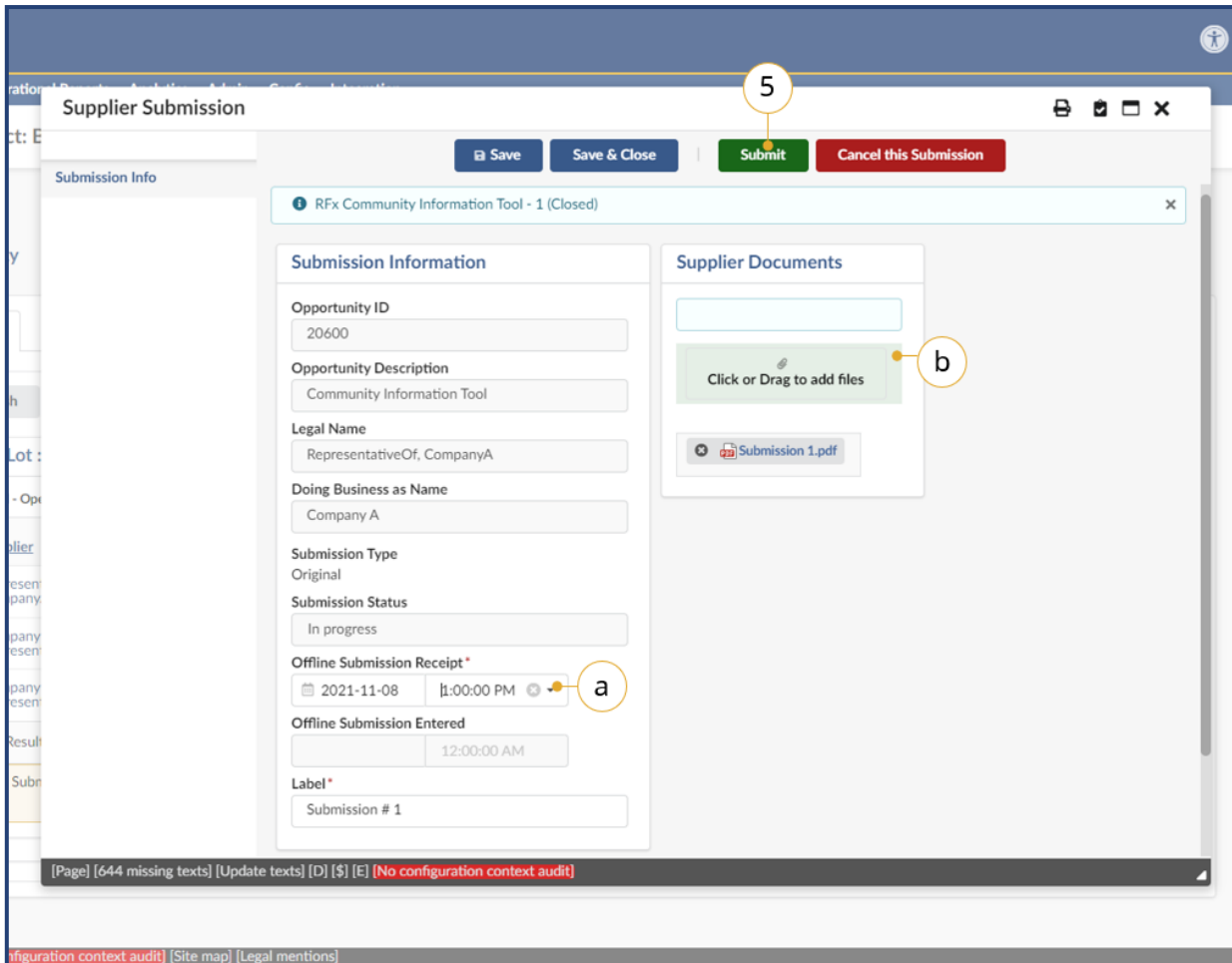


[Uploading Submissions](#)

Note: If a supplier is not listed on the View RFX tab, see [Adding Suppliers Not On Qualified List](#) to add them before uploading the submission.



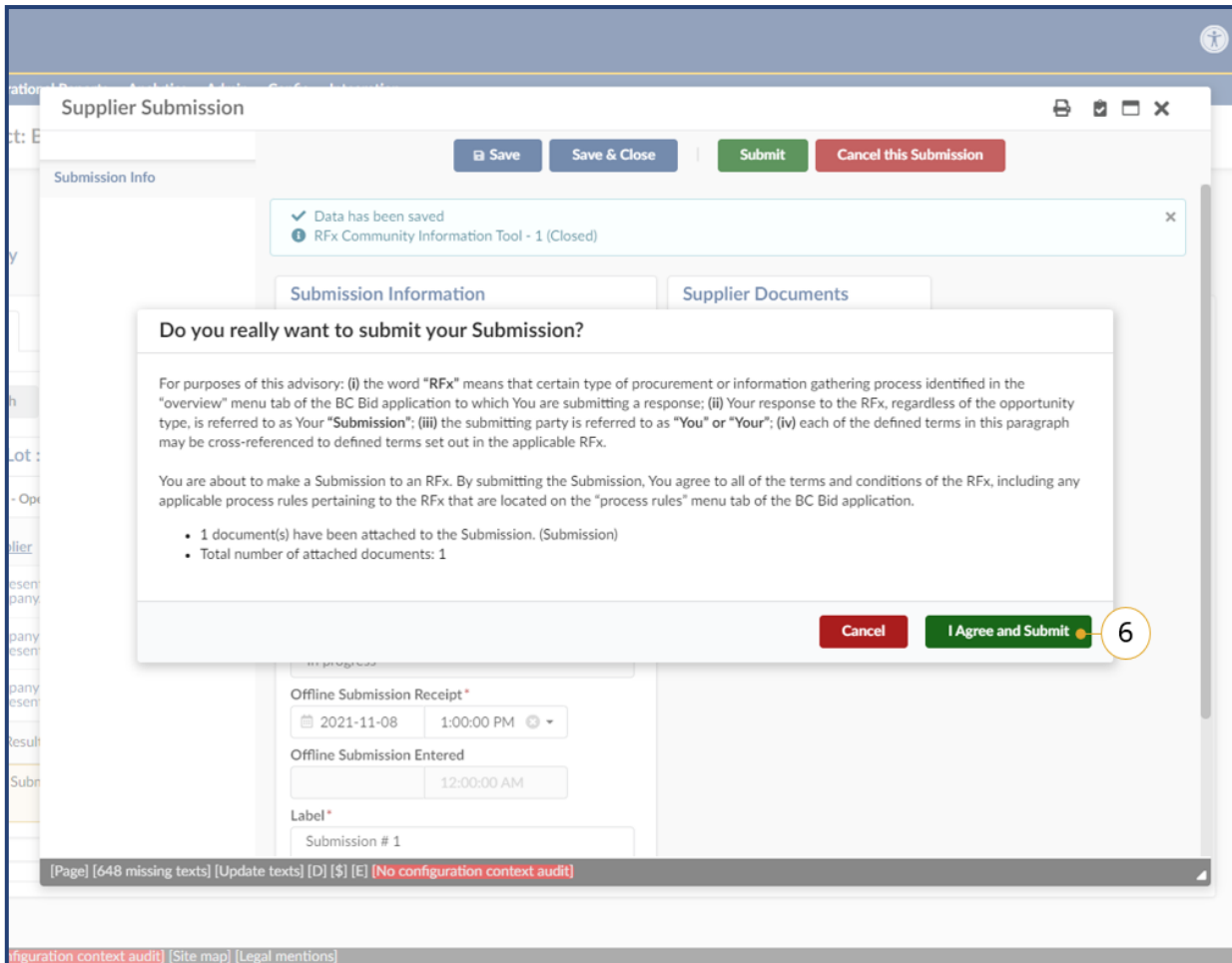
The Responsible must upload Submissions to BC Bid for any Opportunity that is not accepting BC Bid Electronic Submissions. Submissions must be uploaded to award, shortlist or not award and to create a Contract Award Notice.



- a. Select a date and time under **Offline Submission Receipt**
 - b. Click the **Click or Drag to add files** button or drag a file to upload a Submission.
Note: document count field will detail the number of documents attached to the submission
5. Click **Submit**.

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

6. Click **I Agree and Submit**.



As a Buyer you are not agreeing to this pop-up advisory. It's a step required to upload a Submission into BC Bid for creation of the contract award notice within your Opportunity.

7. Click **Save and Close**

The screenshot shows a web application window titled "Supplier Submission". At the top right of the window, there is a "Save & Close" button, which is circled in orange with the number "7" next to it. Below the button, there is a notification box with three items:

- Bid Received on 2021-11-08 1:10:43 PM
- RFx Community Information Tool - 1 (Closed)
- Your submission has been successfully sent. The Official Contact has been notified. You can follow your response status within the History tab (left-hand menu) using "submitted" as the Status filter

The main content area is divided into two columns:

- Submission Information:**
 - Opportunity ID: 20600
 - Opportunity Description: Community Information Tool
 - Legal Name: RepresentativeOf, CompanyA
 - Doing Business as Name: Company A
 - Submission Type: Original
 - Submission Status: Received
 - Offline Submission Receipt:

2021-11-08	1:00:00 PM
------------	------------
 - Offline Submission Entered:

2021-11-08	1:10:43 PM
------------	------------
- Supplier Documents:**
 - Submission 1.pdf

At the bottom of the window, there is a status bar with the text: "[Page] [648 missing texts] [Update texts] [D] [\$] [E] [No configuration context audit]".

Unseal Submissions

Before unsealing Submissions ensure that all Submissions have been uploaded to the Opportunity. See [Upload Submissions](#).

The screenshot shows the BC Bid Sourcing project interface for 'BPM017004 - Community Information Tool - Prepare RFX'. The left-hand menu is visible, with 'Prepare RFX' highlighted and circled with a '1'. The main content area shows the 'Setup' tab for the RFX. Key fields include 'Amendment Date & Time' (2021-11-08 12:56:19 PM) and 'Enquiries Deadline' (12:00:00 AM). There are checkboxes for 'Interested Supplier List used for this RFX' and 'NDA required from Suppliers'. The 'Visible to Public' section has a checked box for 'Post this opportunity publicly?'. The 'Sealed Submissions' section is circled with a '2' and contains a padlock icon and the text: 'All Submissions are sealed. The person in the Responsible role can unseal the Submissions after the Closing Date and Time has passed.' Below this is a 'Tracking' section with 'Created on' (2021-11-08 12:45:36 PM) and 'Last Modification' (2021-11-08 1:05:13 PM) timestamps.

1. In the left-hand menu, click **Prepare RFX**, then navigate to the **Setup** tab.
2. Within Sealed Submissions, click the **padlock** icon to unseal submissions.

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

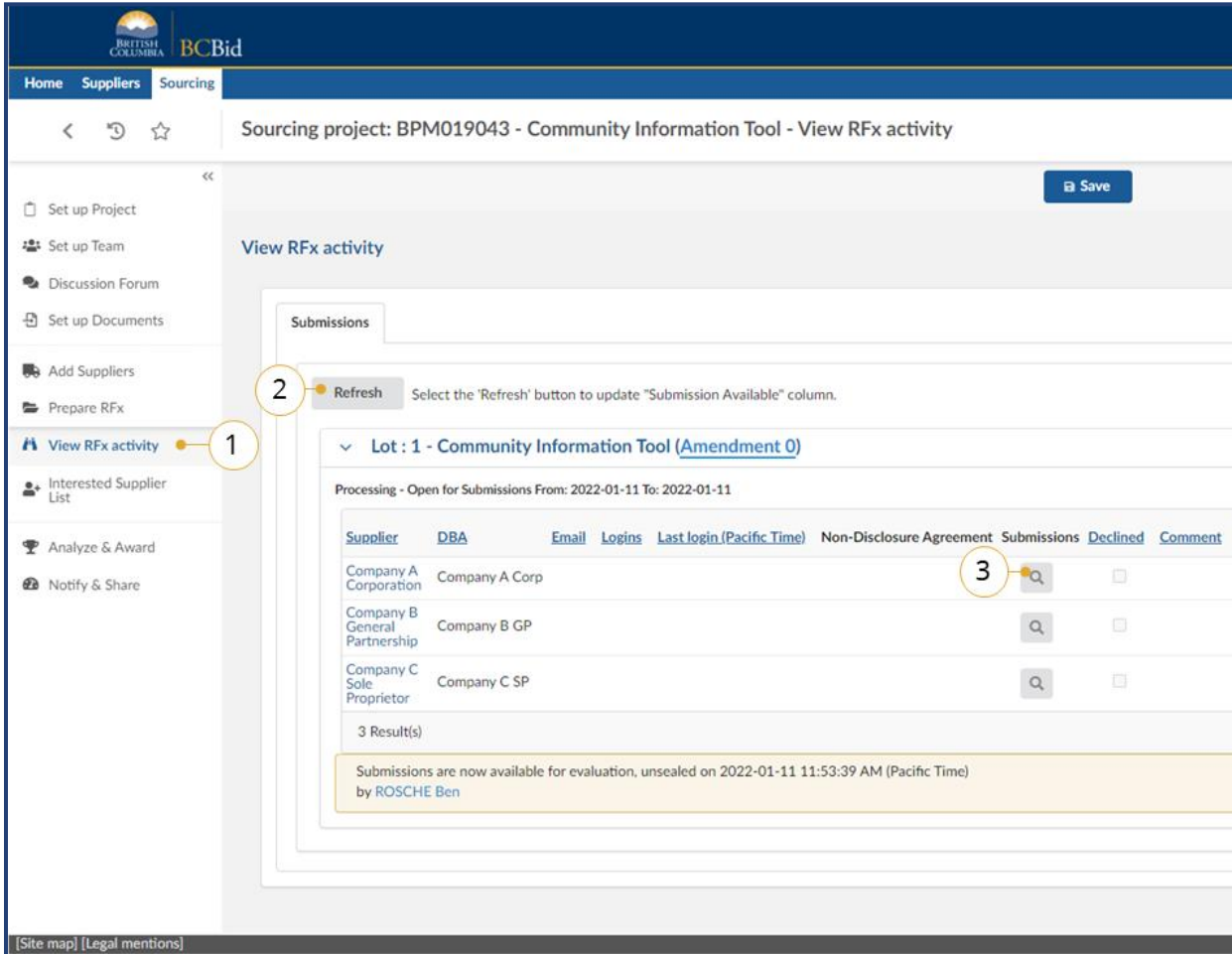
‘Have you uploaded ALL offline Submissions into BC Bid?
If not, click CANCEL. If you click OK, you will no longer be able to upload offline Submissions. Once unsealed, offline Submissions cannot be uploaded. Please refer to your Buyer Guide for full instructions.’



[Unsealing and Downloading Submissions](#)

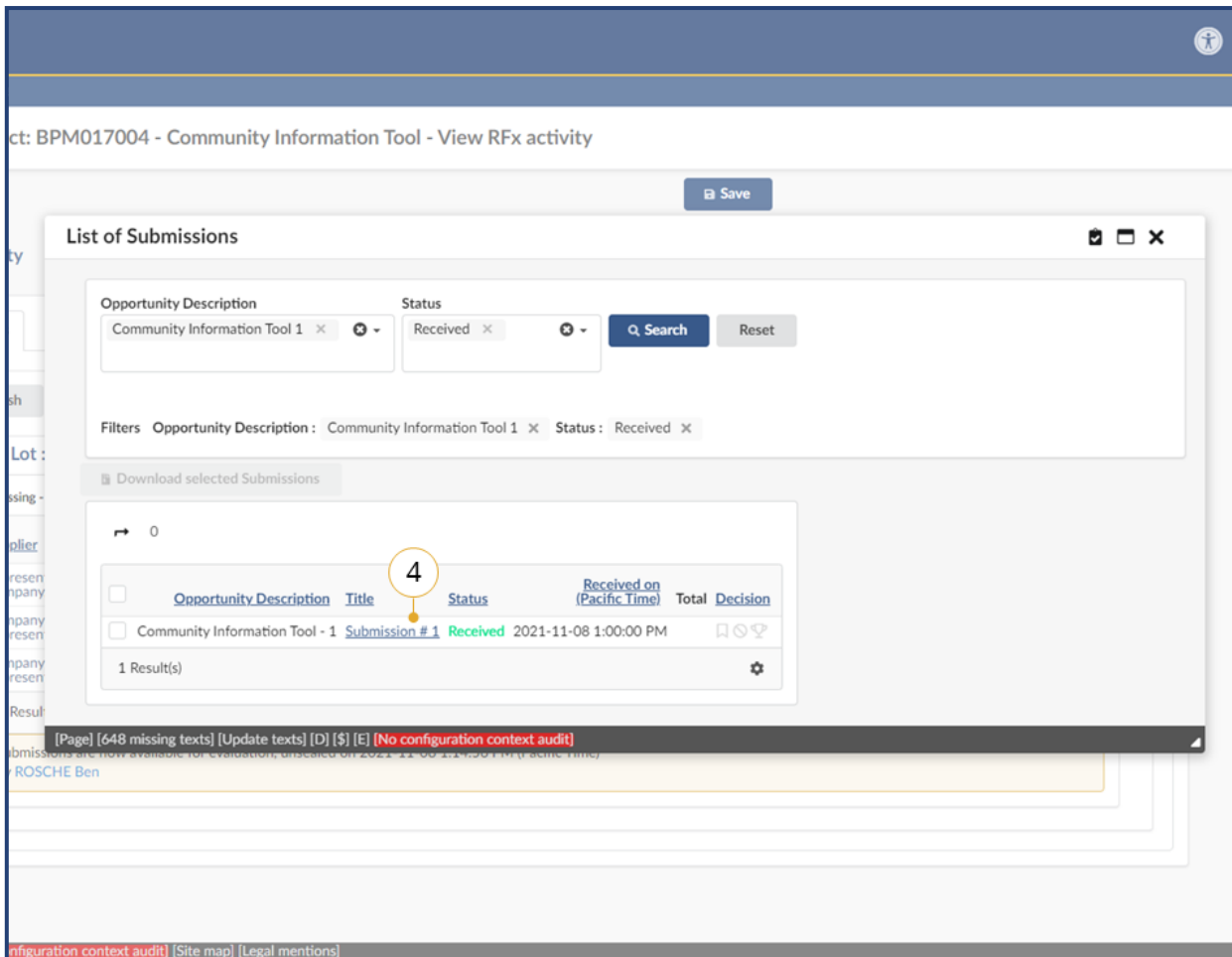
Step 6 – Analyze and Award

View RFX Activity – Download Submissions



1. In the left-hand menu, click **View RFX activity**.
2. For Opportunities that do not require Submissions to be unsealed, click the **Refresh** button to confirm the Submissions Available Confirm with “Refresh” column is up to date.
3. Click the **magnifying glass** icon in the Submissions column for each Supplier to download their Submission.

Note: If you have received no compliant bids in response to your opportunity, or you must cancel the opportunity before awarding the contract, ensure that you mark the unsealed bids as ‘Do Not Award’ (page 126). Once you have done this, you will be able to notify the unsuccessful or affected suppliers via the Notify and Share Tab (page 129).



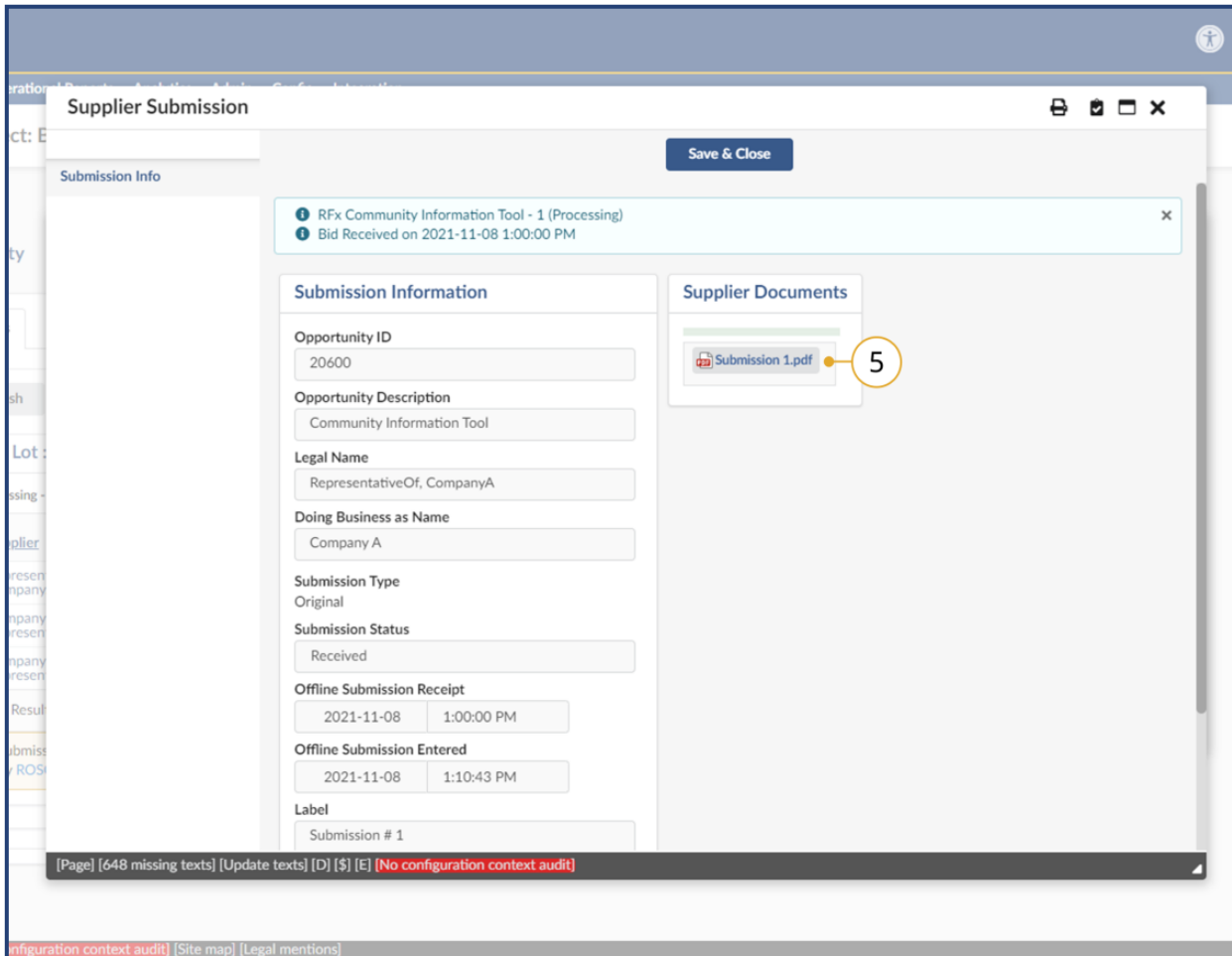
4. Click the **Title** hyperlink.

Notes: If alternative submissions are allowed, select all Submissions to download them.

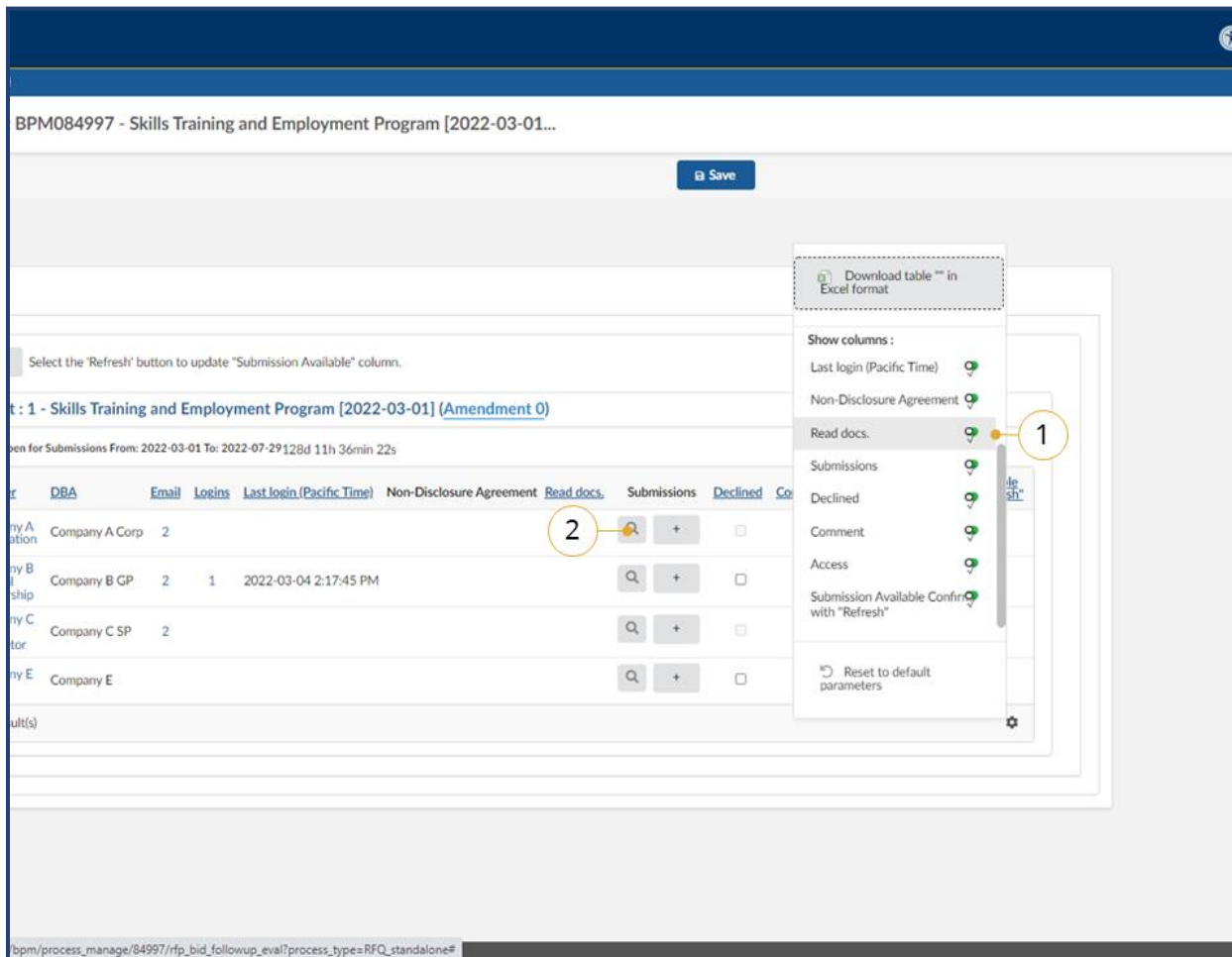
Note: Never use the Status filter to review Submissions that were replaced by a new Submission or cancelled by a Supplier.



Buyers should note that the zipped file generated when they click '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.



5. Click the Submission(s) in the **Supplier Documents** section to download.
Note: document count field will detail the number of documents attached to the submission



Alternatively, a Buyer may choose to show the Read Docs column, to review the Submissions.

1. Click the cog icon and then toggle **Read Docs**. To on.
2. Select the **magnifying glass** icon.

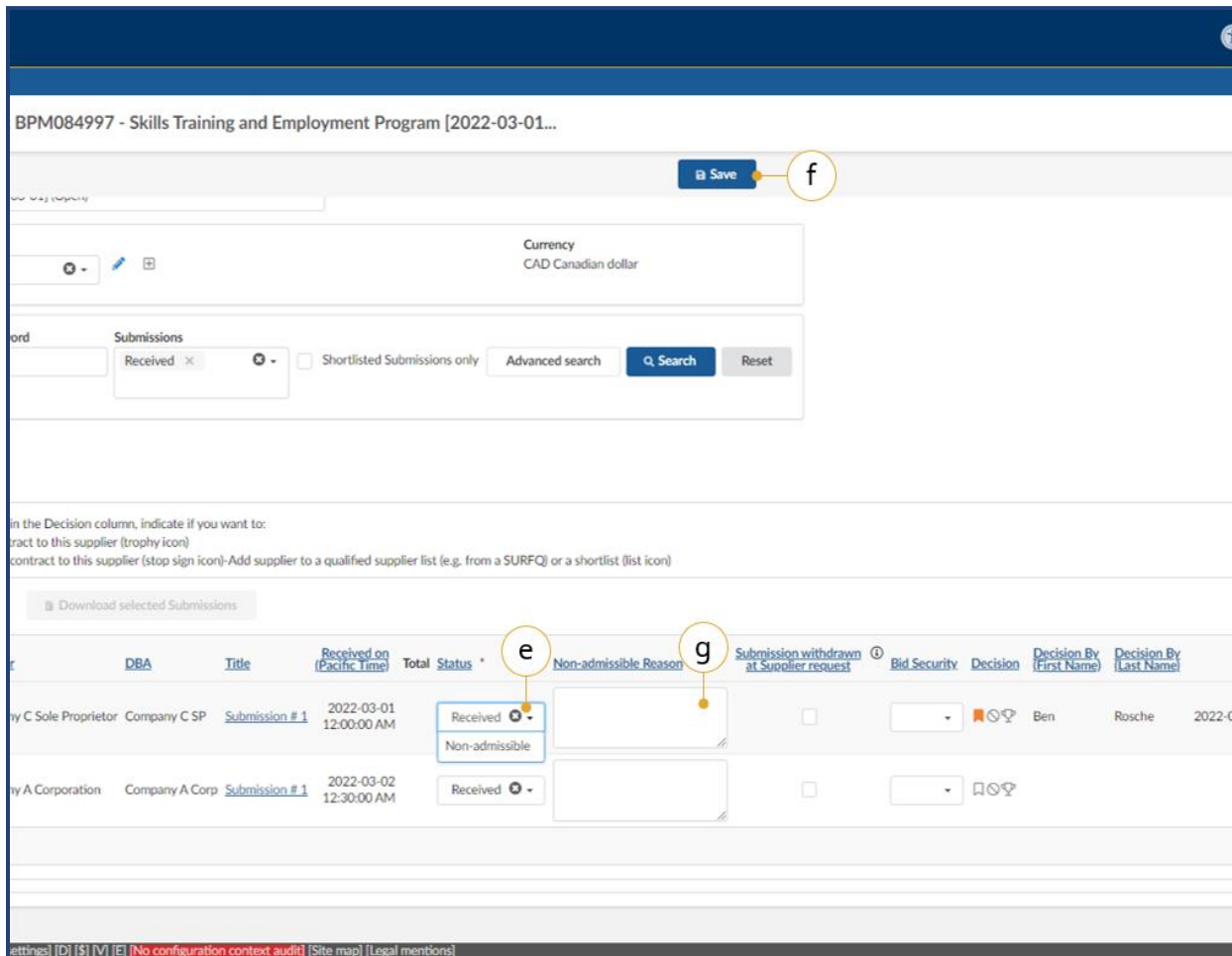
Decision – Award Submissions

The screenshot shows the 'Analyze & Award' tab in the BC Bid system. The interface includes a left-hand navigation menu with 'Analyze & Award' selected and numbered '1'. The main content area is titled 'Analyze & Award' and contains several sections:

- Selected Amendment*:** A dropdown menu showing 'Lot : 1 - Amendment : 0 - Community Information Tool (Processing)', circled with callout 'a'.
- Scenarios:** A dropdown menu showing 'Scenario #1 (validated simulation)', circled with callout 'b'. To its right, the 'Currency' is set to 'CAD Canadian dollar'.
- Submissions:** A section with a 'Search by keyword' input field, a 'Submissions' dropdown menu showing 'Received', and a 'Shortlisted Submissions only' checkbox, circled with callout 'c'. There is also a 'Search' button and an 'Advanced search' link.
- Submissions Table:** A table with columns for 'Supplier', 'DPA', 'Title', 'Received on', 'Total Est. \$', 'Max. admissible Budget', and 'Submis'. A 'Download selected Submissions' button is located above the table.

Callout 'd' points to the 'Shortlisted Submissions only' checkbox. The bottom of the page includes a footer with '[Site map] [Legal mentions]'.

1. Navigate to the **Analyze & Award** tab.
 - a. Using the Selected Amendment dropdown, ensure the most recent Amendment is selected.
 - b. The Scenarios section will not be used.
 - c. Use the Submissions dropdown to filter between Received or Non-admissible Submissions.
 - d. Click the Shortlisted Submissions only checkbox if the Opportunity is only shortlisting qualified Suppliers.



- e. 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.
- f. Click Save.
- g. *Optional:* Buyers can change the status of a Submission to Non-admissible by clicking **Non-admissible** in the Status drop-down list.

Note: This step must be completed after all official notifications are sent to the Suppliers as Suppliers can see the updated status on their Supplier Dashboard.

Please confirm by clicking OK.










OK Cancel

Project: BPM019043 - Community Information Tool - Analyze & Award

Save

Instructions in the Decision column, indicate if you want to:
 Award the contract to this supplier (trophy icon)
 Do not award the contract to this supplier (stop sign icon)
 Add to a qualified supplier list (e.g. from MULRFQ) or a shortlist (list icon)
 Confirm Decision after selecting the list icon to create qualified supplier list or shortlist

Download selected Submissions

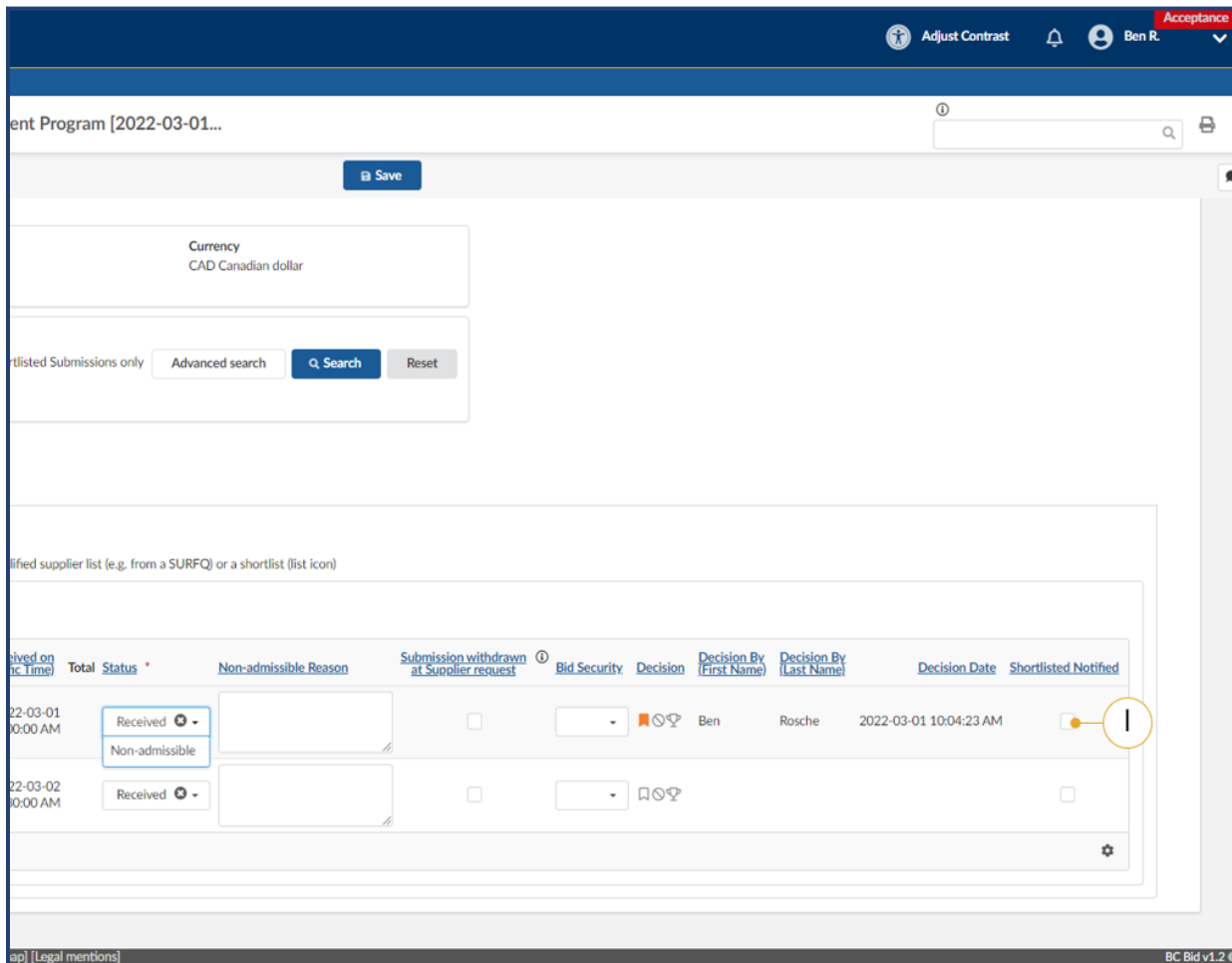
Supplier	DBA	Title	Received on (Pacific Time)	Total	Status *	Non-admissible Reason	Submission withdrawn at Supplier request	Bid Security	Decision	Decision By (First Name)
Company C Sole proprietor	Company C SP	Submission # 1	2022-01-12 12:00:00 AM		Received		<input type="checkbox"/>		  	
Company B General Partnership	Company B GP	Submission # 1	2022-01-26 12:00:00 AM		Received		<input type="checkbox"/>		  	Ben
Company A Corporation	Company A Corp	Submission # 1	2022-01-11 12:00:00 AM		Received		<input type="checkbox"/>		  	Ben

- h. Click the **Do Not Award** icon in the Decision column for the Submissions that were unsuccessful.
- i. Click the **Shortlist** icon to shortlist the runner-up Submissions.
- j. Click the **Award** icon to identify the lead Supplier.
- k. Click **OK** after each selection.



[Awarding a Contract](#)

Note: The **Do Not Award** and **Shortlist** suppliers must be selected before the **Awarded** supplier. Click the Award icon to unaward a selection to make changes to do not award or shortlisted suppliers.



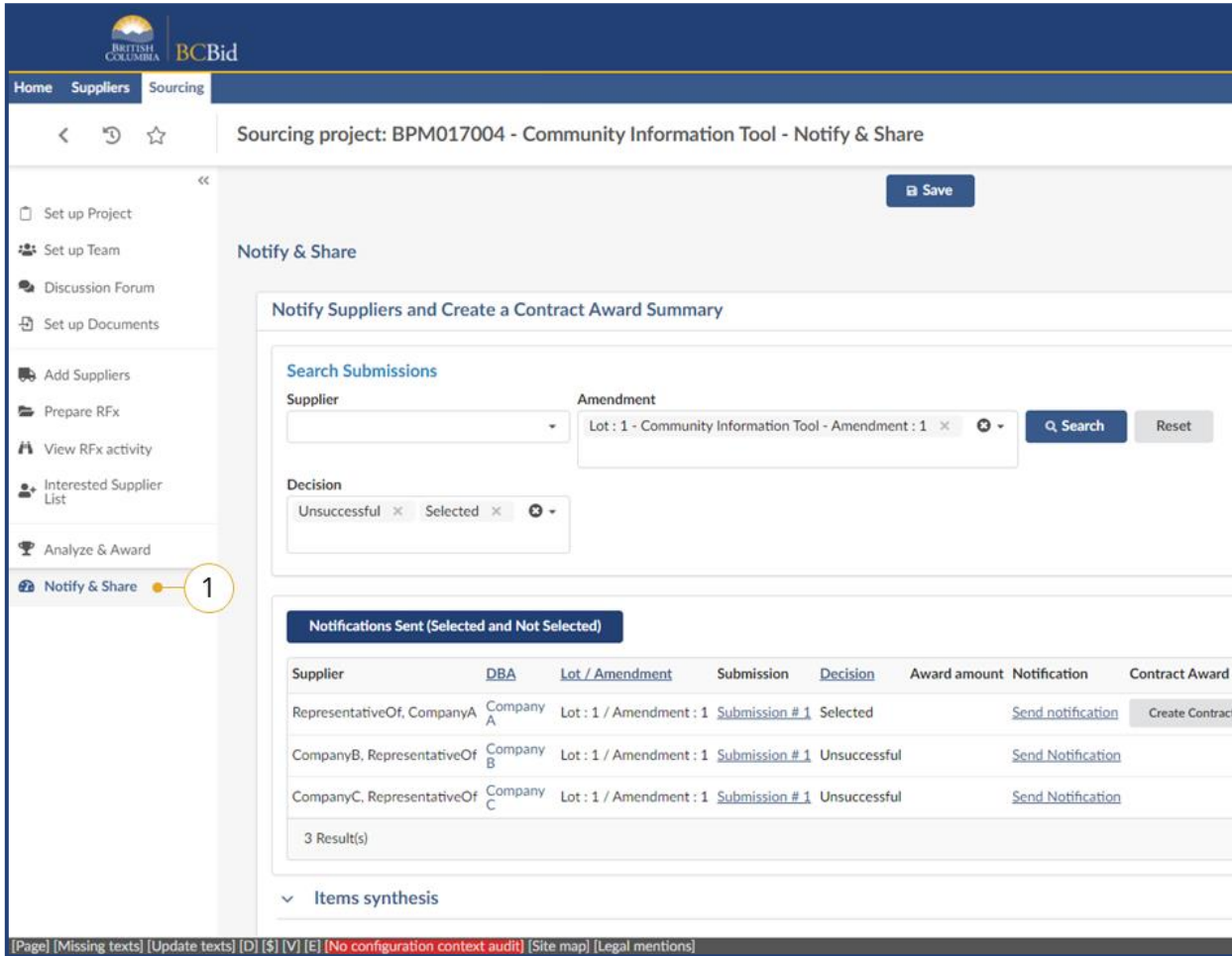
- I. After sending notifications to those who qualified to a Qualified Suppliers List, see [Send Notifications](#), select the **Shortlisted Notified** checkbox next to the qualified Supplier(s) to internally keep track of whether or not the shortlisted supplier has been notified.



[Sending List Results Notifications to Suppliers](#)

Note: To post a list of qualified suppliers publicly, you must go into your MUL and click on the **Prepare RFX** setup tab on the left-hand side. From here under 'Visible to Public' select the checkbox titled 'Post Shortlisted results publicly?'. Once clicked this will publish the list of qualified suppliers. This option is only available for a MUL.

Step 7 – Notify and Share



1. In the left-hand menu, click **Notify and Share** and review the information.

Note: Have you received no compliant bids in response to your solicitation?

If the unsuccessful proposals are in BC Bid, and unsealed, you must mark them as 'Do Not Award' in the Analyze & Award Tab (page 121) and then you will be able to send 'unsuccessful' notifications to the unsuccessful suppliers using the Notify and Share Tab.

Note: Will your opportunity be cancelled before awarding?

If the proposals are in BC Bid, you must mark the bids as 'Do Not Award' prior to cancelling the opportunity, then you will be able to send notifications to the affected suppliers from the Notify and Share Tab.



For MUL and SURFQ Sourcing Projects, Buyers should notify all Respondents using the Discussion Forum in the left-hand menu or government email.

Send Notifications

The screenshot shows the 'Notify & Share' interface for sourcing project BPM017004. It features search filters for Supplier, Amendment (Lot: 1 - Community Information Tool - Amendment: 1), and Decision (Unsuccessful, Selected). A table displays the following data:

Supplier	DBA	Lot / Amendment	Submission	Decision	Award amount	Notification	Contract Award Summary
RepresentativeOf, CompanyA	Company A	Lot : 1 / Amendment : 1	Submission # 1	Selected		Send notification	Create Contract Award Summary
CompanyB, RepresentativeOf	Company B	Lot : 1 / Amendment : 1	Submission # 1	Unsuccessful		Send Notification	
CompanyC, RepresentativeOf	Company C	Lot : 1 / Amendment : 1	Submission # 1	Unsuccessful		Send Notification	

A callout box with the number '1' points to the 'Send notification' link for the 'Selected' submission.

1. Buyers can use the **Search Submissions** field to narrow filter by Supplier, Amendment or the Decision made on the Analyze & Award tab.

Click **Notifications Sent (Selected and Not Selected)** or the **Send notification** hyperlink in the Notification column.

Note: This is not applicable for any process that creates a Qualified Suppliers List. Buyers should use the Discussion Forum or government email to notify Suppliers that were successful at qualifying for the Qualified Suppliers List.



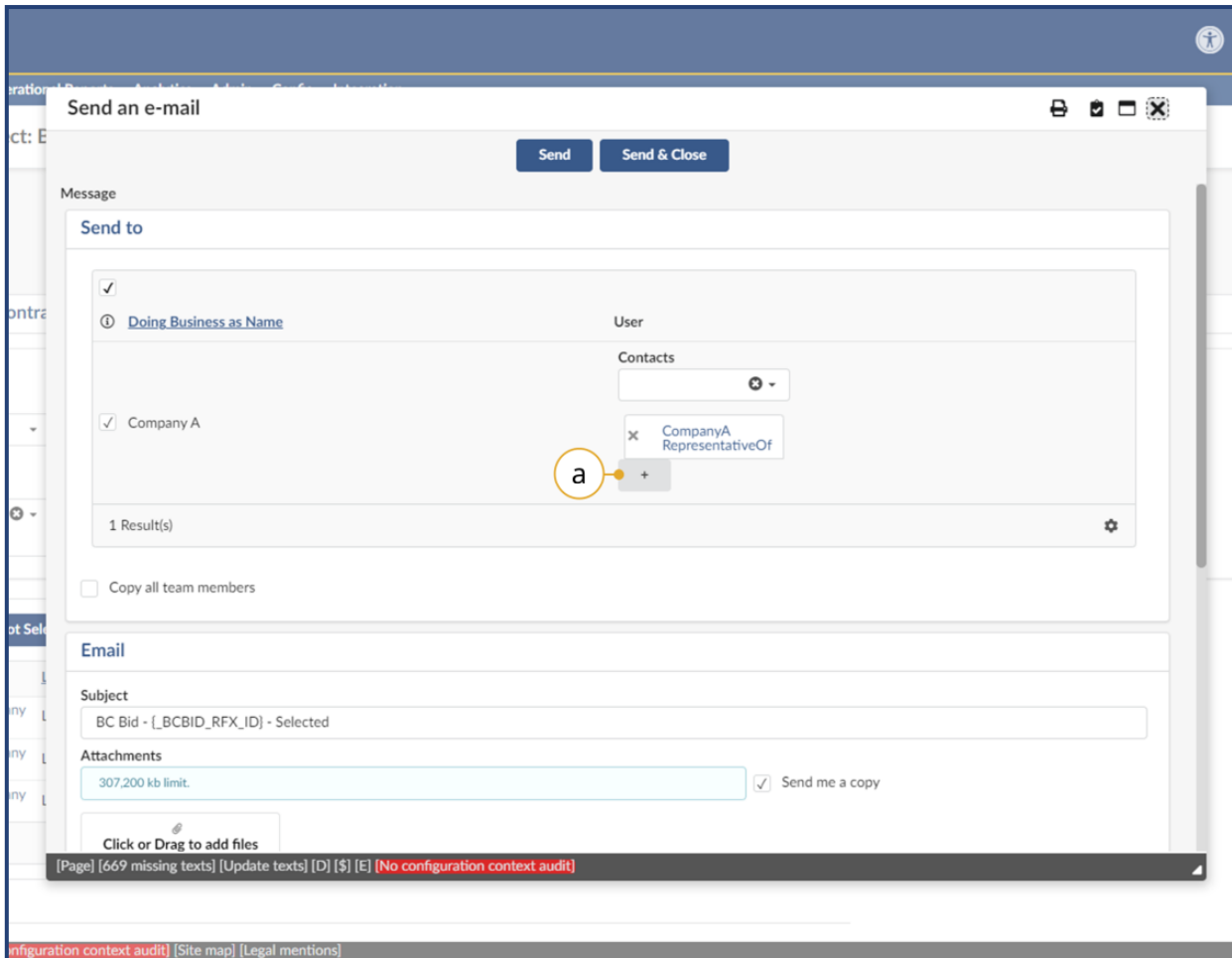
[Sending Award Results Notification to Suppliers](#)



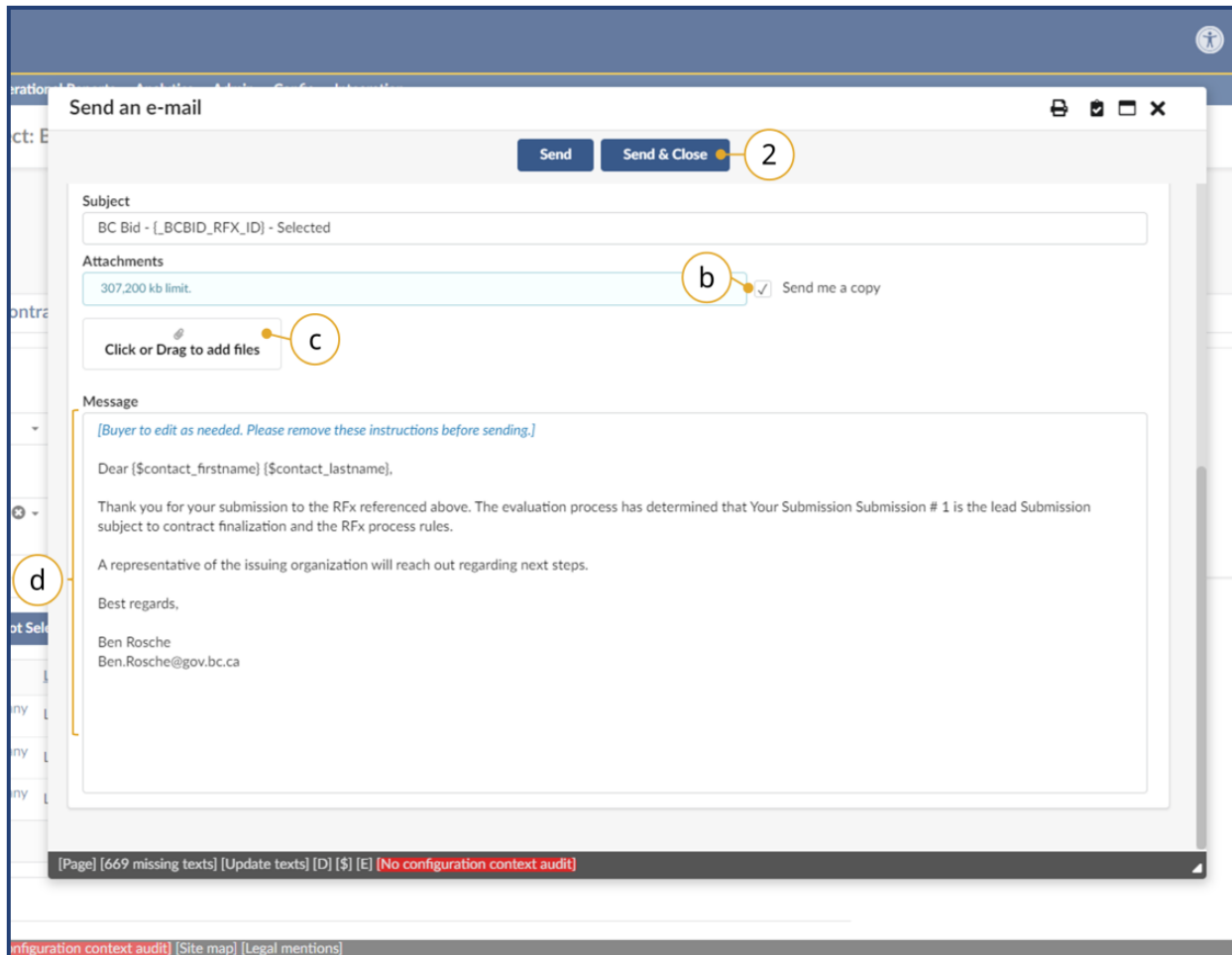
[Sending List Results Notification to Suppliers](#)



If the Buyer awarded a non-admissible Submission the Buyer will be unable to complete the actions described in this section.



- a. *Optional:* In the User column, select the + icon if a contact is needed.



- b. *Optional:* Click the **Send me a copy** checkbox to receive a copy of the notification.
 - c. *Optional:* Click **Click or Drag to add files** to add files or drag a file.
 - d. In the **Message** textbox review the message. Make edits as required then remove the **Blue** text.
2. Click **Send & Close**.

Note: The email message can be edited as necessary.

Contract Award Summary

1. Click **Create Contract Award Summary**.



[Creating a Contract Award Summary](#)

Note: If a contract is not awarded, do not create a Contract Award Summary. See [Complete an Opportunity](#) on how to cancel an opportunity.



Once a Contract Award Summary is published it can be edited but it cannot be canceled.

Contract: Print Close

Save & Close 2

Submission
Community Information Tool(Submission # 1)

General Information

Contract Number* a
C22/0001

Type
Simple Agreement

Sourcing Project
Community Information Tool

Supplier
RepresentativeOf, CompanyA

Main Address

Justification for Direct Award/Limited Tendering f
Add the rationale for the contract award. If you didn't follow a competitive process include an appropriate reason for the direct award as specified by the applicable trade agreements. Otherwise state "Competitive"

Award Date* b
[Calendar icon]

Contract Value* d
250000

Issuing Location* c
Victoria

Contract contact email* e
Ben.Rosche@gov.bc.ca

Scope of Contract

Commodities
81112000 - Data services

Issued by
Ministry of Citizens' Services

[Page] [669 missing texts] [Update texts] [D] [\$] [E] [No configuration context audit]

Price CAD

ation context audit] [Site map] [Legal mentions]

In the Contract window, complete the following:

- a. Enter **Contract Number**.
- b. Select **Award Date**.
- c. Enter the full address of the **Issuing Location**.
- d. Enter **Contract Value**.
- e. Enter **Contract contact email**.
- f. Enter "Competitive" in **Justification for Direct Award/Limited Tendering**, if the Opportunity is competitive. If not, apply the appropriate Direct Award as described in Core Policy and Procedures Manual Chapter 6.

2. Click **Save & Close**.

Edit or Delete a Contract Award Summary

Suppliers Sourcing Operational Reports

Sourcing project: BPM115371 - Community Information Services - Notify & Share

Save

Notify & Share

Notify Suppliers and Create a Contract Award Summary

Search Submissions

Supplier: [Dropdown] Amendment: Lot : 1 - Community Information Services - Amendment : 0 [X] [Reset] [Search]

Decision: Unsuccessful [X] Selected [X] [Reset]

Notifications Sent (Selected and Not Selected)

Supplier	DBA	Lot / Amendment	Submission	Decision	Award amount	Notification	Contract Award Summary
Company A Corporation	Company A Corp	Lot : 1 / Amendment : 0	Submission # 1	Selected		Send notification	CTR024337LC220011 1 Create Contract Award Summary
Company B General Partnership	Company B GP	Lot : 1 / Amendment : 0	Submission # 1	Unsuccessful		Send Notification	

2 Result(s)

Items synthesis

0 Result(s)

Award overview

1. Select the hyperlink above the Create Contract Award Summary button.



This action cannot be completed after the steps identified in [End Opportunity](#).

Contract:

Contract header

Type: Simple Agreement Contract: 24337 Status: Awarded

Sourcing Project: Community Information Services Rfx reference: Community Information Services

Contract Number*: C220011

Supplier: Company A Corporation Supplier Address*: 18 Douglas St, Victoria, British Columbia

Justification for Direct Award/Limited Tendering: [Empty field]

Award Date*: 2022-05-18 Issuing Location*: Capital

Contract Value*: 150,000.00 Contract contact email*: ben.rosche@gov.bc.ca

Issued by: Ministry of Citizens' Services Commodities: 10100000 - Live animals

Tracking

0 Result(s)

Save

2. In the **Status** dropdown, select Awarded, if the Contract Award Summary is being edited. Select Deleted if the Contract Summary is to be removed from the Public Portal.
3. If editing, edit the relevant fields.
4. Select **Save**.

Complete an Opportunity

Home Suppliers Sourcing

Sourcing project: BPM085220 - Community Information Tool - Prepare RFX

Save and Close Validate & Save Create a new lot

✓ Data has been saved
⚠ The ability to edit the RFX is limited when not in Draft status.

Selected Lot - Amendment*

Lot : 1 - Amendment : 1 - Community Information Tool (Closed) -

Setup Additional RFX Info Documents Suppliers Approvals Approval Workflow

Prepare RFX - Setup

RFX Settings

Opportunity ID
156089

RFX Status
Closed

Opportunity Type
Request for Proposal

Opportunity Description
Community Information Tool

Lot # ⓘ
1

Amendment # ⓘ
1

Amendment reason
thunf

Estimated Amount (CAD) ⓘ

Cancel Complete

1. Click the **Complete** button.
2. *Optional:* If justified, select the **Cancel** button.

The screenshot shows the BC Bid Sourcing interface for project BPM085220. A confirmation dialog box is open, asking: "Are you sure you want to Complete this RFX? Click OK to Complete the RFX and Cancel to keep the RFX in its current state. The RFX Complete action cannot be undone." The dialog has "OK" and "Cancel" buttons. A yellow circle with the number "3" points to the "OK" button. The background interface shows the "Prepare RFX - Setup" section with fields for Opportunity ID (156089), RFX Status (Closed), Opportunity Type (Request for Proposal), Opportunity Description (Community Information Tool), Lot # (1), Amendment # (1), and Amendment reason (thunf). A status bar at the bottom contains various system messages and links.

3. Click the **OK**.

Step 8 – Downstream Activities

Opportunity	How used	See Page
MUL	Used on a new Sourcing Project and the associated Opportunity Type(s) by adding the Qualified Suppliers List through the Add Suppliers tab – Adding Suppliers From a Qualified Suppliers List .	140
SURFQ	Used for an Opportunity immediately downstream to the creation of the Qualified Suppliers List.	141
New Lot	Used for Limited Tendering (NOI/CAN) to create the Contract Award Notice downstream to the Notice of Intent process.	147

Multi-use List Downstream Process

In the downstream process, the results of this RFX will be used to establish a Qualified Suppliers List. This Qualified Suppliers List can then be used to invite qualified suppliers to a subsequent RFX. For information on how to use a Qualified Suppliers List to invite Suppliers, see [Adding Suppliers From a Qualified Suppliers List](#) (p.60).

Note: There can only be one service area per Qualified Suppliers List, so users should create one Multi-use List event for each service area.

Single-use Request for Qualifications Downstream Process

BCBid

Sourcing

Sourcing project: BPM018740 - SURFQ for Architect - Prepare RFx

Validate & Save | Create a new lot

Setup | Additional RFx Info | Documents | Suppliers | Approvals | Approval Workflow

2

Prepare RFx - Setup

⚠ - Opportunity is nearing the Closing Date

RFx Settings

Opportunity ID
22993

RFx Status
Processing | Cancel | Complete

Opportunity Type
Single Use Request for Qualification

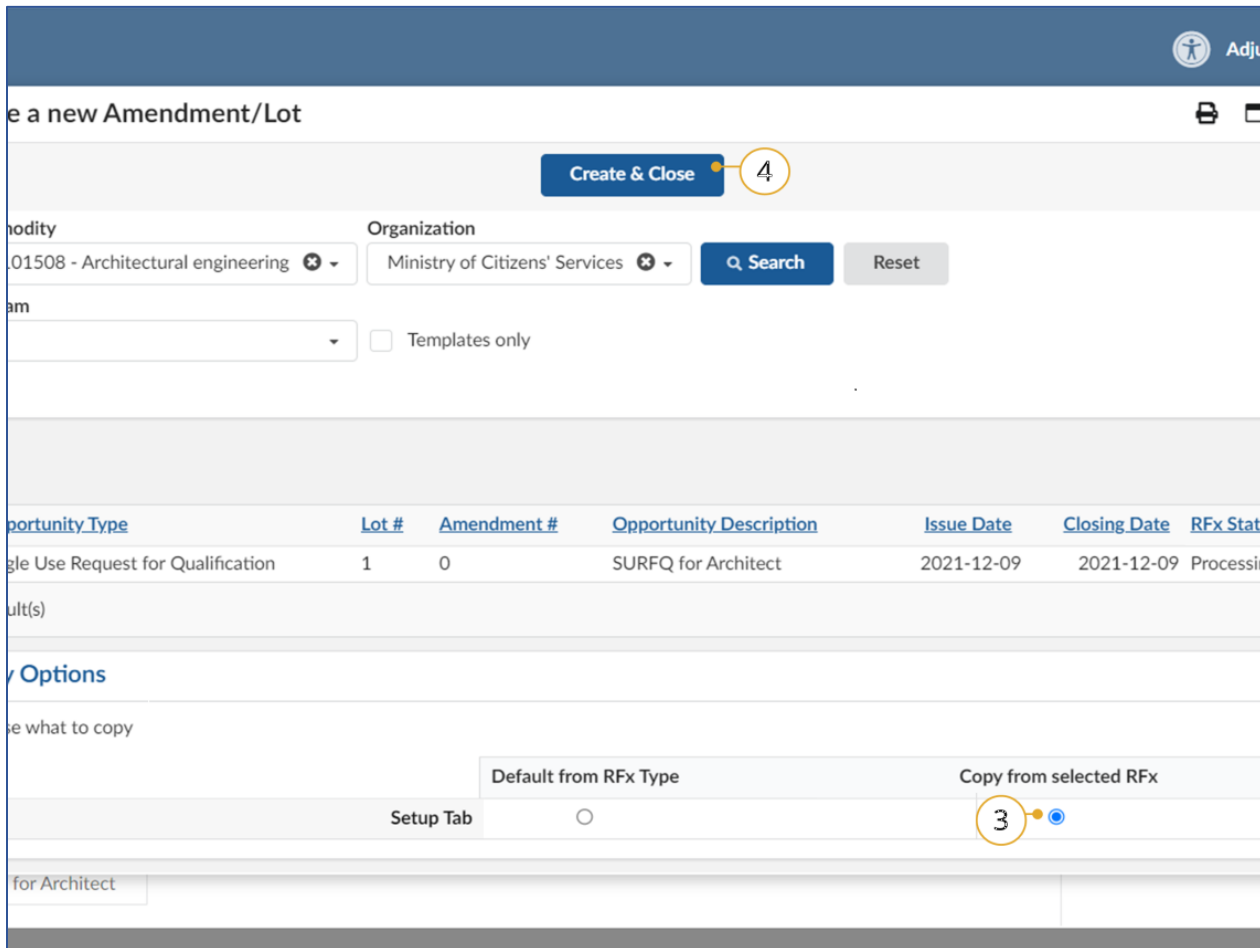
1. In the left-hand menu, click **Prepare RFx**.
2. Click **Create a new lot**.



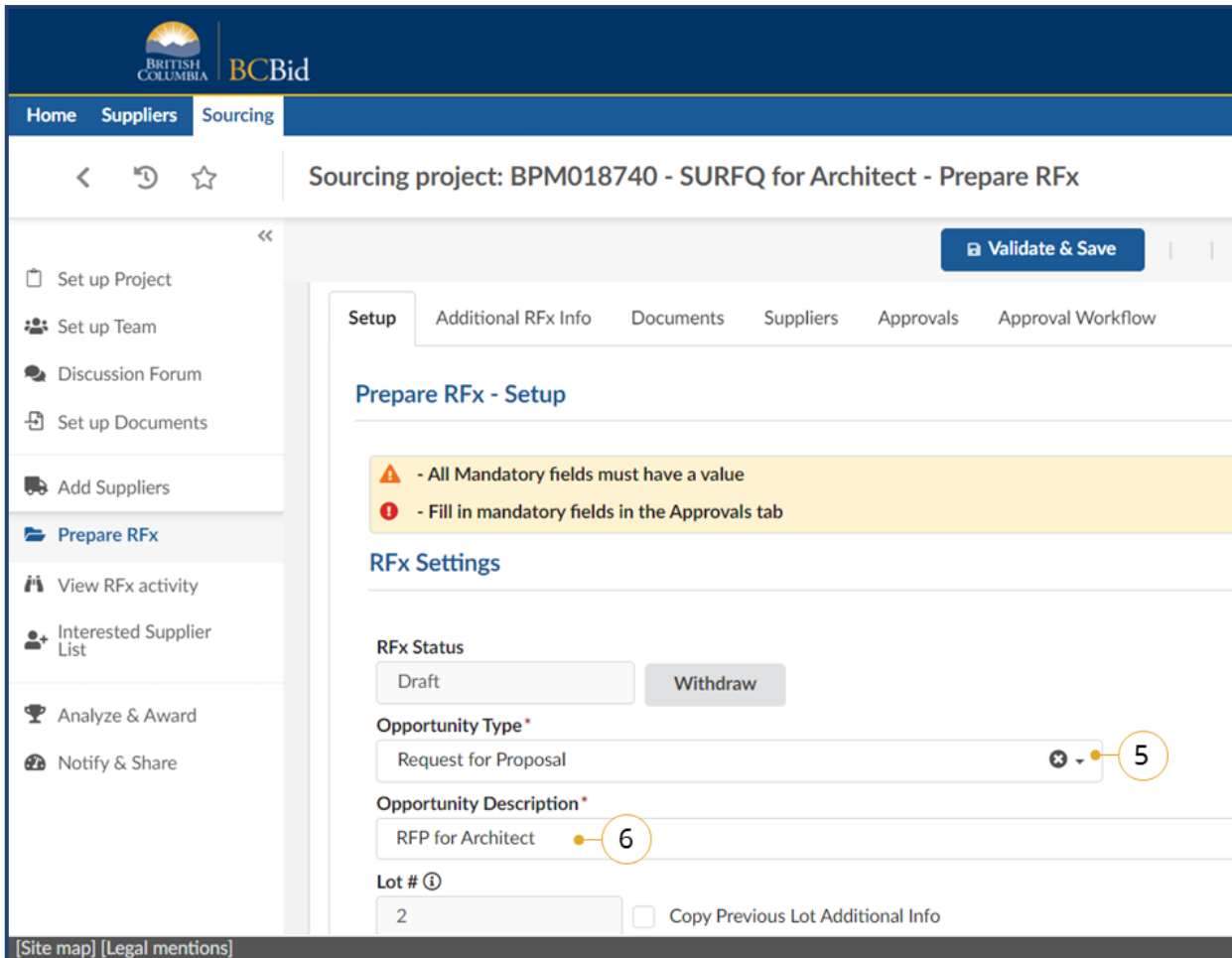
[How to Transfer a Qualified Suppliers List from a SURFQ](#)



If creating a new Lot, that is not downstream to a Single use Request for Qualifications, see [Create New Lot](#).



3. In the Create a new Amendment/Lot dialog box, in Copy Options, select the radio button in the **Copy from selected RFX** column.
4. Click **Create & Close**.



5. In the **Opportunity Type** drop-down list, select the applicable opportunity type for the downstream process.
6. Enter the Opportunity Description.

The screenshot shows the BC Bid Sourcing interface. At the top, there is a navigation bar with 'Home', 'Suppliers', and 'Sourcing' tabs. Below this is a breadcrumb trail: 'Sourcing project: BPM018740 - SURFQ for Architect - Prepare RFX'. A left-hand navigation menu contains various project management options. The main content area is titled 'Sourcing project: BPM018740 - SURFQ for Architect - Prepare RFX' and features a 'Validate & Save' button (callout 11). Below this is the 'Summary Details' section (callout 7) with a text box containing 'Request For Proposal for Architectural Services required at 1234 Province Rd, Victoria B'. The 'Issue Date and Closing Date' section (times shown in Pacific Time) includes an 'Issue Date' field (callout 8) set to 2021-12-09 3:00:00 PM, an 'Auto issuing' checkbox (callout 9) which is unchecked, a 'Closing Date & Time' field (callout 10) set to 2022-01-06 2:00:00 PM, and an 'Auto closure' checkbox which is checked. At the bottom, there is a 'Sealed Submissions' section with a lock icon and the text 'All Submissions are sealed. The person in the Responsible role can unseal the Submissi'. A footer at the bottom left contains '[Site map] [Legal mentions]'.

7. In the **Summary Details** text box, enter a summary of the opportunity.
8. Select an **Issue Date**.
9. *Optional:* Select **Auto issuing**.
10. Select a **Closing Date & Time**.
11. Click **Validate & Save**.

BRITISH COLUMBIA BCBid

Home Suppliers Sourcing

Sourcing project: BPM018740 - SURFQ for Architect - Prepare RFx

13 Validate & Save Ready to Issue

Set up Project

Set up Team

Discussion Forum

Set up Documents

Add Suppliers

Prepare RFx

View RFx activity

Interested Supplier List

Analyze & Award

Notify & Share

Summary Details ⓘ*

Request For Proposal for Architectural Services required at 1234 Province Rd, Victoria B

Add shortlisted suppliers from a single-use RFQ

Add shortlisted suppliers ⓘ 12

To add all shortlisted suppliers from a single-use Request For Qualifications to this RFx, che

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

Issue Date ⓘ*

2021-12-09 3:00:00 PM ⓘ Auto issuing ⓘ

Closing Date & Time ⓘ*

[Site map] [Legal mentions]

12. Complete any mandatory fields and then select **Add shortlisted suppliers** checkbox.
13. Click **Validate & Save**.

The screenshot displays the BCBid Sourcing project interface. At the top, the navigation bar includes 'Home', 'Suppliers', and 'Sourcing'. The main header shows the project title: 'Sourcing project: BPM018740 - SURFQ for Architect - Prepare RFX'. Below this, there are buttons for 'Validate & Save' and 'Ready to Issue'. The left sidebar contains a list of project management tasks, with 'Prepare RFX' highlighted. The main content area is titled 'Selected Lot - Amendment*' and shows a dropdown menu for 'Lot : 2 - Amendment : 0 - RFP for Architect (Draft)'. A 'View as Supplier' link is visible. Below the dropdown, there are tabs for 'Setup', 'Additional RFX Info', 'Documents', 'Suppliers', 'Approvals', and 'Approval Wo'. The 'Suppliers' tab is active, showing a section titled 'Prepare RFX - Suppliers'. This section includes a checkbox for 'Invited Suppliers' and a list item 'Company B GP' with a checkmark. Below the list, it indicates '1 Result(s)'. A callout bubble with the number '14' points to the 'Suppliers' tab.

14. Select **Suppliers** tab and review the updated list of qualified Suppliers.

Create 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.

Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time.
Click on save to update your selections

Validate & Save | Other Actions

Send Invitation
Create a new lot
Create a new amendment
Close Opportunity

Set up Additional RFX Info Documents Suppliers Approvals Approval Workflow

Prepare RFX - Setup

RFX Settings

Opportunity ID
22861

RFX Status
Open Cancel

Opportunity Type
Request for Proposal

Opportunity Description
Community Information Tools

Lot # ⓘ
1

Amendment # ⓘ
1

Amendment reason
Uploaded Appendix A.

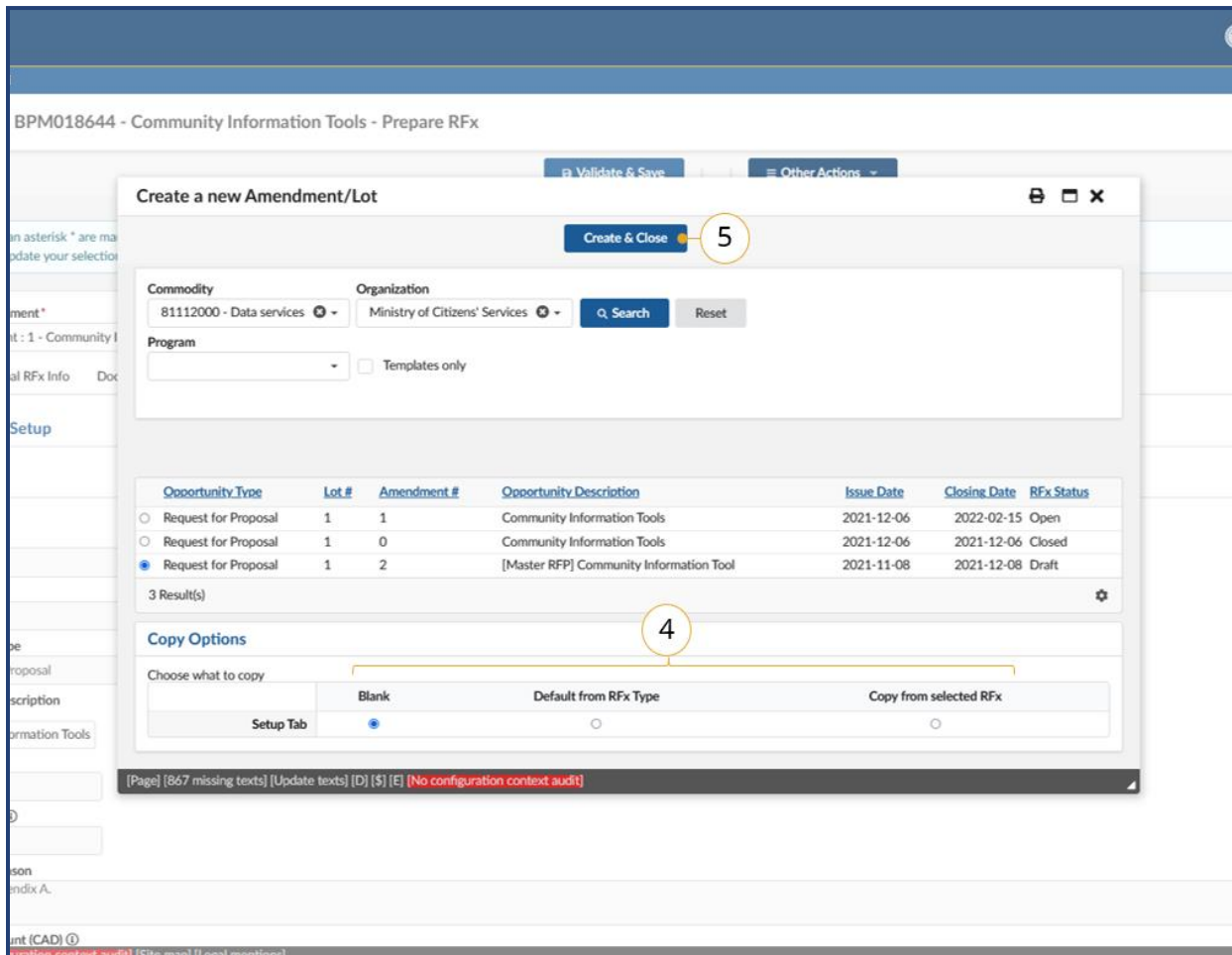
Estimated Amount (CAD) ⓘ

[Page] [Missing texts] [Update texts] [D] [\$] [V] [E] [No configuration context.audit] [Site map] [Legal mentions]

1. In the left-hand menu, click **Prepare RFX**.
2. To toggle between amendments or lots choose the amendment or lot using the **Selected Lot - Amendment** dropdown.
3. Click **Create a new lot**.



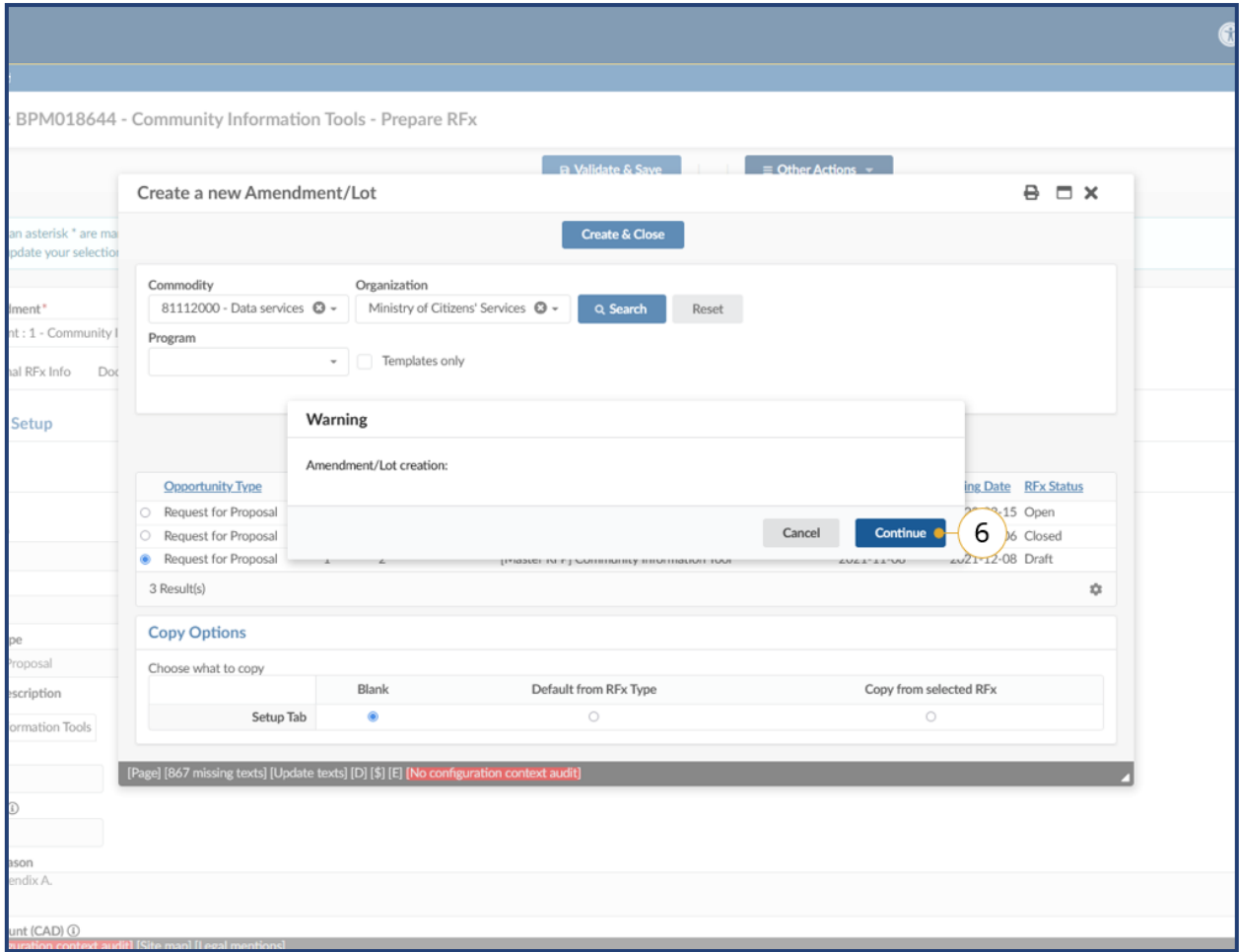
[How to create a new lot](#)



4. In the Create a new Amendment/Lot window, select the appropriate options: Blank, Default from RFX Type, or Copy from selected RFX.
5. Click **Create & Close**.



Selecting “Blank” will create a new lot that has no opportunity type assigned to it. Selecting “Default from RFX Type” will copy the current opportunity type with no information copied from the previous version. Selecting “Copy from selected RFX” will create an exact duplicate of the opportunity that a new lot is being developed off.

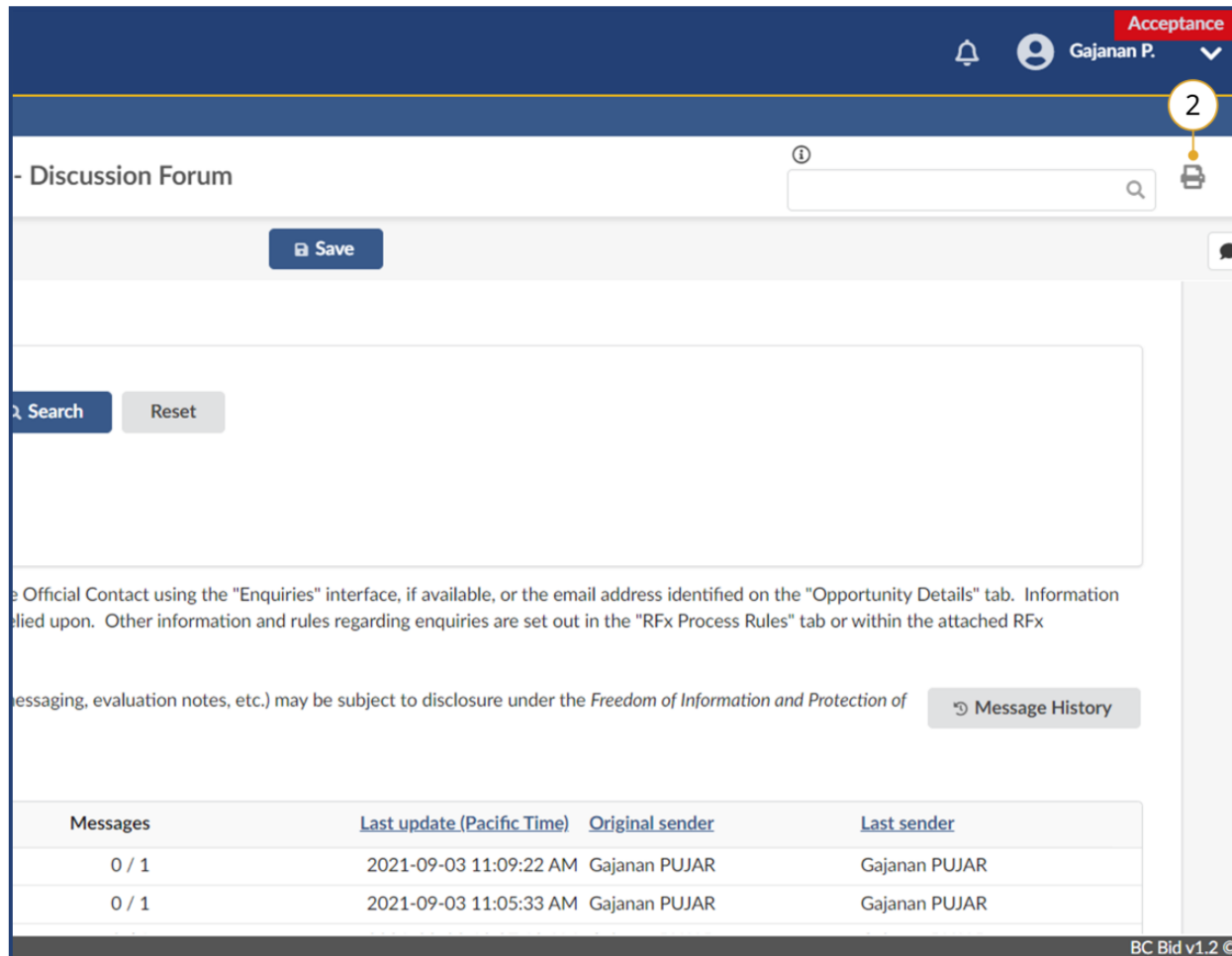


6. Click **Continue**.

Step 9 – Complete the Opportunity and Project

Printing Records

The Print icon can be used to print a tab or menu of a sourcing project or to save an opportunity as 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 Freedom of Information (FOI) requests outside the application.



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

3
Print
Close

Discussion Forum

If you have recently been assigned the "Official Contact" role, replacing a previous individual in the role, click the "Recover Messages" button to get

Search by keyword

Display

All ✕ ▾

Enquiries related to this RFX may only be directed in writing to the Official Contact using the "Enquiries" interface, if available, or the email address official and should not be relied upon. Other information and rules regarding enquiries are set out in the "RFX Process Rules" tab or within the attache

Please be neutral and objective in your commentary, as all data (messaging, evaluation notes, etc.) may be subject to disclosure under the *Freedom of Information Act*.

Subject	Messages	Last update (Pacific Time)	Original sender	Last sender
RFP for Architect - Clarification	0 / 1	2021-09-03 11:09:22 AM	Gajanan PUJAR	Gajanan PUJAR
Approval to post	0 / 1	2021-09-03 11:05:33 AM	Gajanan PUJAR	Gajanan PUJAR
Test	0 / 1	2021-09-02 10:27:18 AM	Gajanan PUJAR	Gajanan PUJAR

3 Result(s)

Set up Project

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**.

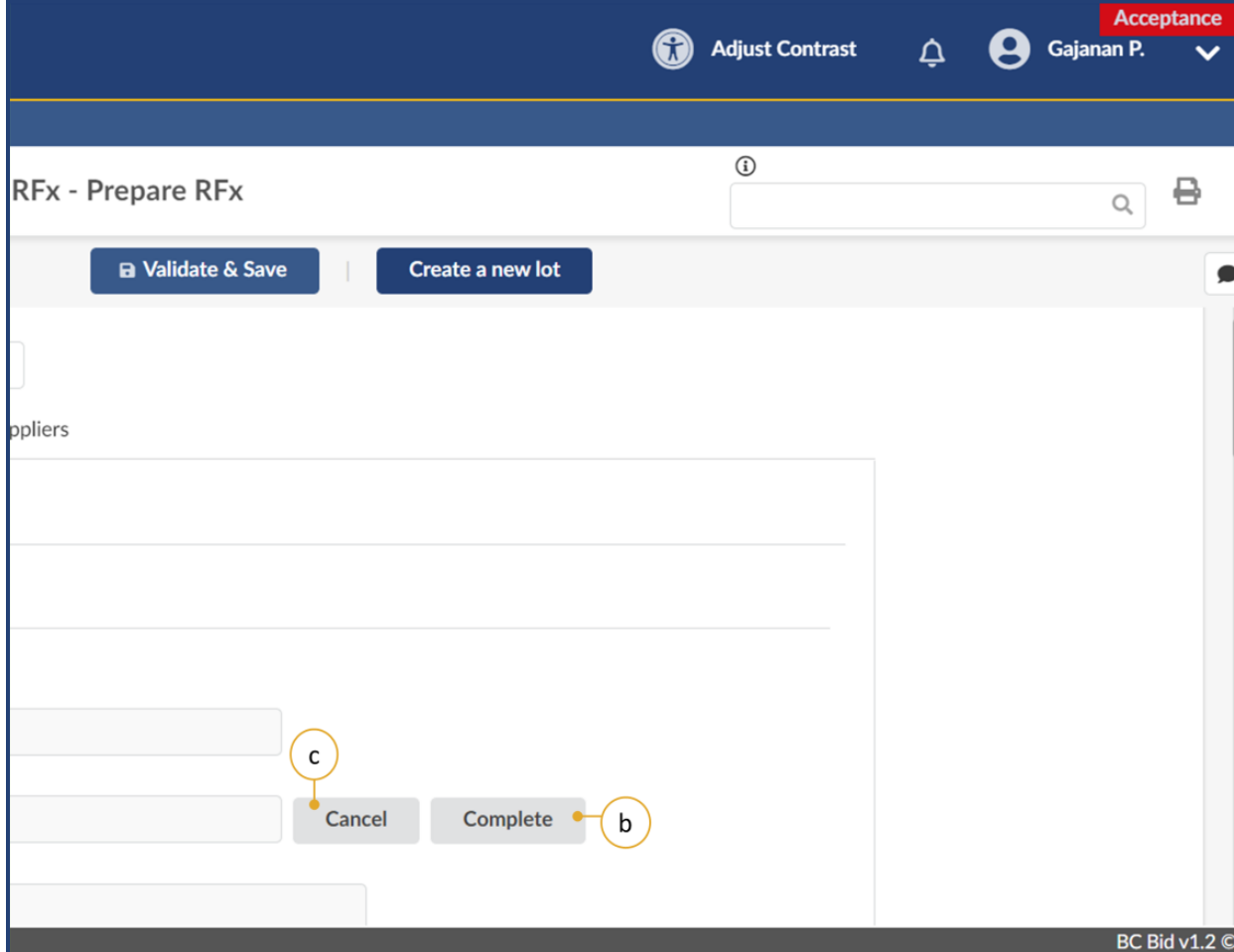
End Opportunity

The screenshot displays the BC Bid Sourcing interface. At the top, the navigation bar includes 'Home', 'Suppliers', and 'Sourcing'. Below this, the breadcrumb trail shows 'Sourcing project: BPM013872 - RFP for Architect - Prepare RFX'. The left-hand menu contains several options, with 'Prepare RFX' highlighted and circled with a yellow circle containing the letter 'a'. The main content area is titled 'Prepare RFX - Setup' and features a sub-menu with 'Setup', 'Additional RFX Info', 'Documents', and 'Suppliers'. The 'Setup' tab is circled with a yellow circle containing the letter 'i'. Below the sub-menu, the 'RFX Settings' section includes three fields: 'Opportunity ID' with the value '17822', 'RFX Status' with the value 'Closed', and 'Opportunity Type' with the value 'Request for Proposal (BPS)'. At the bottom of the page, there are links for '[Site map]' and '[Legal mentions]'.

1. Change the status of the Opportunity to completed:
 - a. In the left-hand menu, click **Prepare RFX**.
 - i. Click the **Setup** tab.



[Closeout an Opportunity](#)



- b. Click **Complete** to change the Opportunity Status from Closed to Completed.
- c. Click **Cancel** to change the Opportunity Status from Open to Canceled, if the Opportunity has been canceled.



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

Close Sourcing Project

1. *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](#)

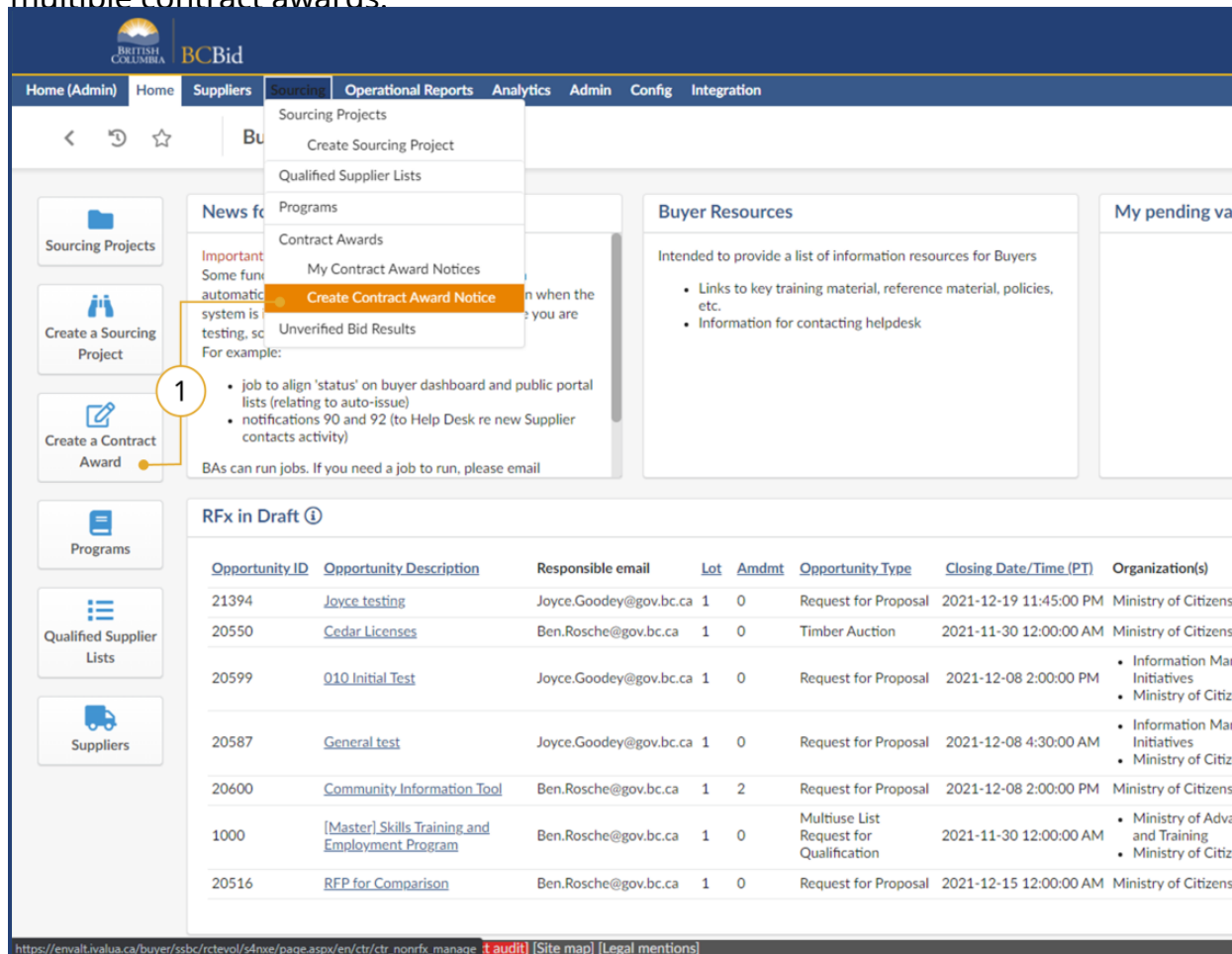


After creating a new Lot, Buyers must complete the necessary menus and tabs then issue the opportunity

Special Considerations

Contract Award Notice Webform

Buyers must use the Contract Award Notice Webform for all direct awards, excluding direct awards awarded through the Notice of Intent (NOI) process. The Contract Award Notice webform is used for any purchases from a standing arrangement, standing offer or other form of direct selection. Additionally, the Contract Award Notice Webform is used for opportunities that result in multiple contract awards.



1. In the Quick Access menu, click **Create a Contract Award** or click **Sourcing** in the main menu, then click **Create Contract Award Notice**.



[Creating a Contract Award Notice](#)

Note: Selecting **My Contract Award Notices** will allow Buyers to review previously posted Contract Award Notices. Buyers may also choose to edit Contract Award Notices issued using this Contract Award Notice Webform. This process is not the same as the [Contract Award Summary](#).

The screenshot shows the 'Create Contract Award Notice' form in the BCBid system. The form is divided into several sections with the following fields and annotations:

- Opportunity ID:** 12814 (Annotation: a)
- Opportunity Type:** Request for Proposal (Simplified) (Annotation: b)
- Opportunity Description:** RFP for GPS Collars (Annotation: c)
- Issuing Organization:** Agricultural Land Commission (Annotation: d)
- Issuing Location:** Victoria BC (Annotation: e)
- Contract Contact Email:** procurement@gov.bc.ca (Annotation: f)
- Contract Number:** 130291GP
- Type:** Simple Agreement
- Supplier:** Blackburn, Calista
- Supplier Address:** 597 Hwy 97, Okanagan Lake Provincial Park
- Award Date:** 2021-09-14
- Contract Value:** 300000
- Justification for Direct Award/Limited Tendering:** The Ministry has chosen the above-mentioned supplier for the following reasons:
 - Delivery commitment by October 27th, 2021 for the first batch, and additional four (4) weeks for the second batch – allows sufficient time to program and test the collars, the software, and then

At the bottom left, there are links for [Site map] and [Legal mentions]. A 'Publish' button is located at the top right of the form area.

2. In the dialog box, complete the following fields:
 - 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**.
Issuing Location must be a complete address.
 - f. Enter the **Contract Contact Email**.

The screenshot shows the 'Create Contract Award Notice' form in the BC Bid system. The form includes the following fields and callouts:

- Opportunity ID:** 12814
- Opportunity Type:** Request for Proposal (Simplified)
- Opportunity Description:** RFP for GPS Collars
- Issuing Organization:** Agricultural Land Commission
- Issuing Location:** Victoria BC
- Contract Contact Email:** procurement@gov.bc.ca
- Contract Number:** 130291GP (Callout g)
- Type:** Simple Agreement
- Supplier:** Blackburn, Calista (Callout h)
- Supplier Address:** 597 Hwy 97, Okanagan Lake Provincial Park (Callout i)
- Award Date:** 2021-09-14 (Callout j)
- Contract Value:** 300000 (Callout k)
- Justification for Direct Award/Limited Tendering:** The Ministry has chosen the above-mentioned supplier for the following reasons:
 - Delivery commitment by October 27th, 2021 for the first batch, and additional four (4) weeks for the second batch – allows sufficient time to program and test the collars, the software, and then
 (Callout l)
- Publish Button:** (Callout m)

At the bottom of the form, there are links for [Site map] and [Legal mentions].

- g. Enter **Contract Number**.
- h. Select the **Supplier**.
- i. Enter the **Supplier Address** (Now a mandatory field).
- j. Select the **Award Date**.
- k. Enter the **Contract Value**.
- l. Enter the **Justification for Direct Award/Limited Tendering**. If awarding multiple contracts from one Opportunity, type "Competitive" in to the textbox.
- m. Click **Publish**.

Delete a Draft Opportunity (RFx)

The screenshot displays the BCBid system interface for deleting a draft opportunity. The main content area shows the 'Prepare RFX - Setup' page with the following details:

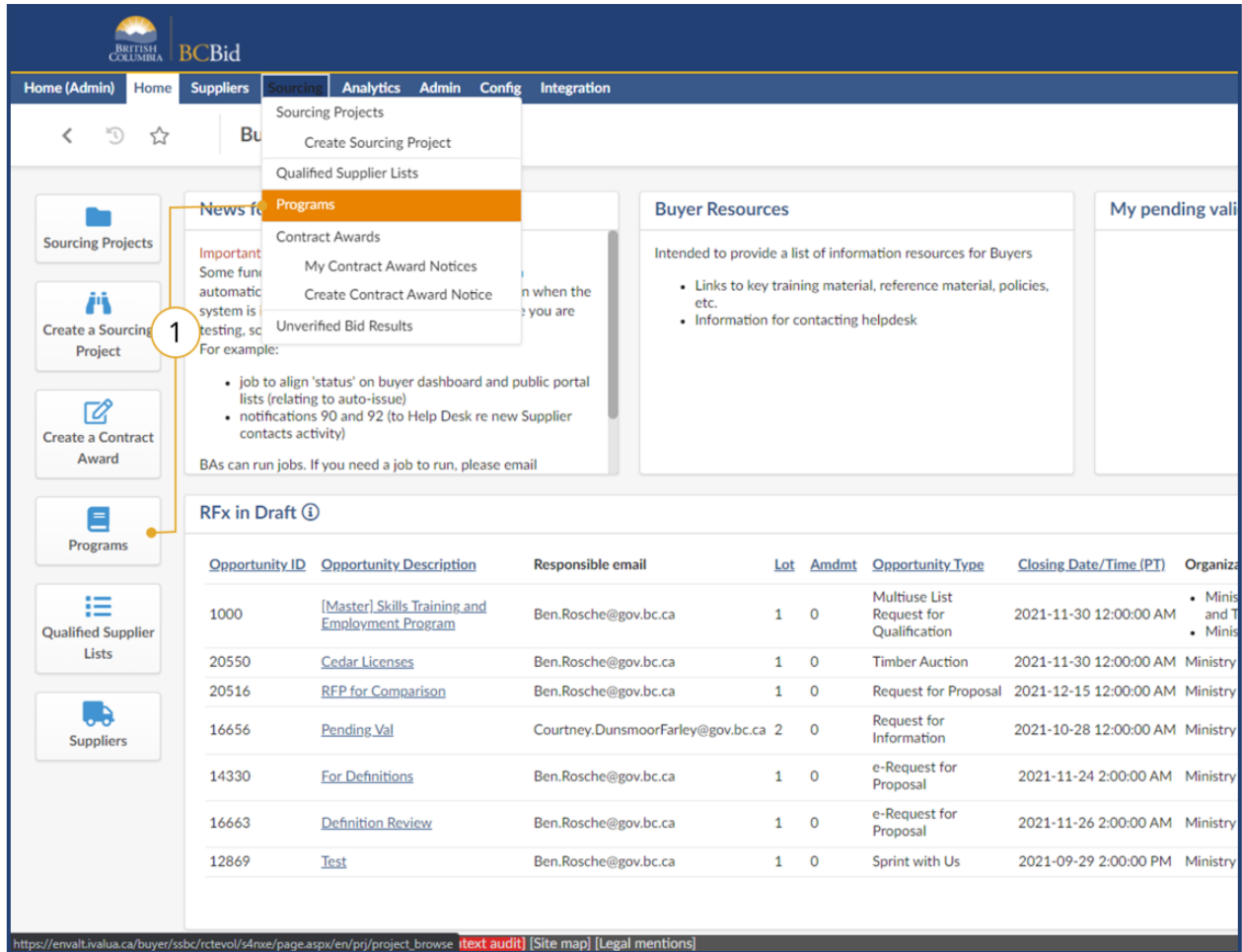
- Selected Lot - Amendment*:** Lot : 2 - Amendment : 0 - (Draft)
- Warning:** - All Mandatory fields must have a value
- Fill in mandatory fields in each of the above tabs
- RFx Settings:**
 - RFx Status:** Draft
 - Opportunity Type*:** Request for Proposal
 - Opportunity Description*:** (Empty field)
 - Lot #:** 2
 - Amendment #:** (Empty field)

The interface includes a left sidebar with navigation options, a top navigation bar, and a footer with system information. Red circles and letters '1', '2', and '3' highlight the 'Prepare RFX' button, the 'Other Actions' dropdown, and the 'OK' button in the dialog box, respectively.

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.

Programs

Programs are document storage repositories 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.



1. Click **Programs** on Quick Access menu or click **Programs** after clicking **Sourcing** in the main menu.



[How to create a Program](#)

Create a Program

The screenshot shows the BCBid Sourcing interface. At the top, there is a navigation bar with 'Home', 'Suppliers', and 'Sourcing' tabs. Below this is a breadcrumb trail with a back arrow, a refresh icon, a star icon, and the text 'Programs'. A search section contains five input fields: 'Search by keyword', 'Contact', 'Status', 'Types', 'Organization', and 'Commodity'. Below the search section is a 'Create Program' button, which is highlighted with a yellow circle containing the number '2'. Underneath the button is a table with the following data:

ID	Code	Program Name
PRJ000040	AA	Test 1
PRJ000039	123	Test
PRJ000038	BC-TRAN-IT	BC Transit IT
PRJ000036	Code-Red	CityVic-IT-Umbrella
PRJ000035	PROG-TEST2	2x Approval Test
PRJ000034	TEst 2-step	TEst 2-step

At the bottom left of the page, there are links for '[Site map]' and '[Legal mentions]'.

2. Click **Create Program**.



Programs can be edited by selecting the pencil icon beside the appropriate Program ID.

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

General Information

Status
Draft

Code
12345

Code*
12345

Program*
Strategic Planning

Currency
CAD

Commodity scope
44112000 - Planning systems

Organizational scope
Information Management & Strategic Initiatives

Description

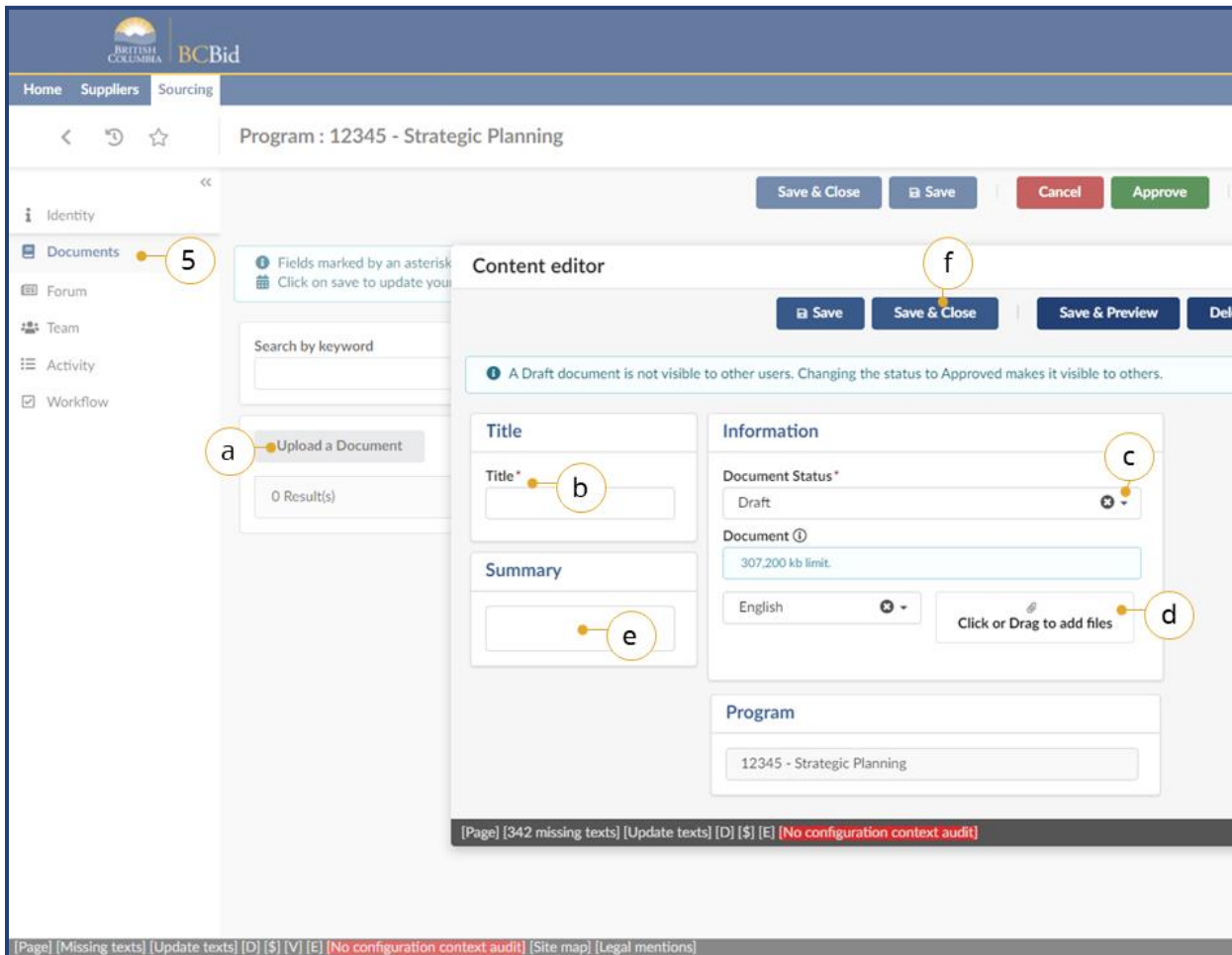
Save & Close Save Duplicate Pro

[Page] [Missing texts] [Update texts] [D] [S] [V] [E] [No configuration context audit] [Site map] [Legal mentions]

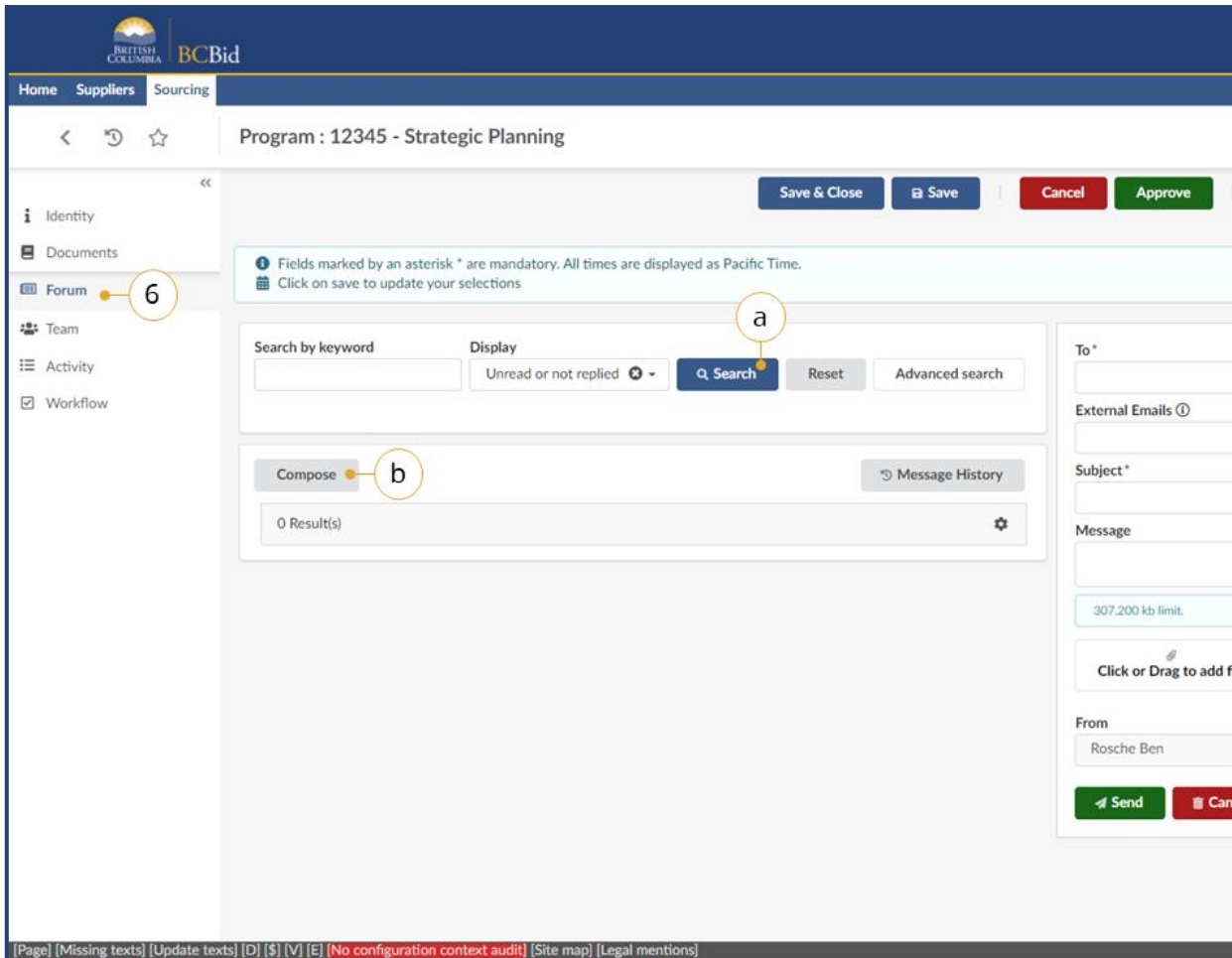
3. On the **Identity** tab, complete the following textboxes:
 - a. In the **Code** textbox, insert a code that identifies the Program. The code cannot have spaces in between or after characters
 - b. In the **Program** textbox, insert a Program name.
 - c. *Optional:* In the **Description** textbox, insert a description of the Program.
 - d. *Optional:* Using the **Commodity scope** drop-down list, select one or multiple relevant commodities.
 - e. Using the **Organizational scope** drop-down list to select one or multiple organizational scope options. If nothing is selected the Program will be visible to all organisations.
4. Click **Save**.



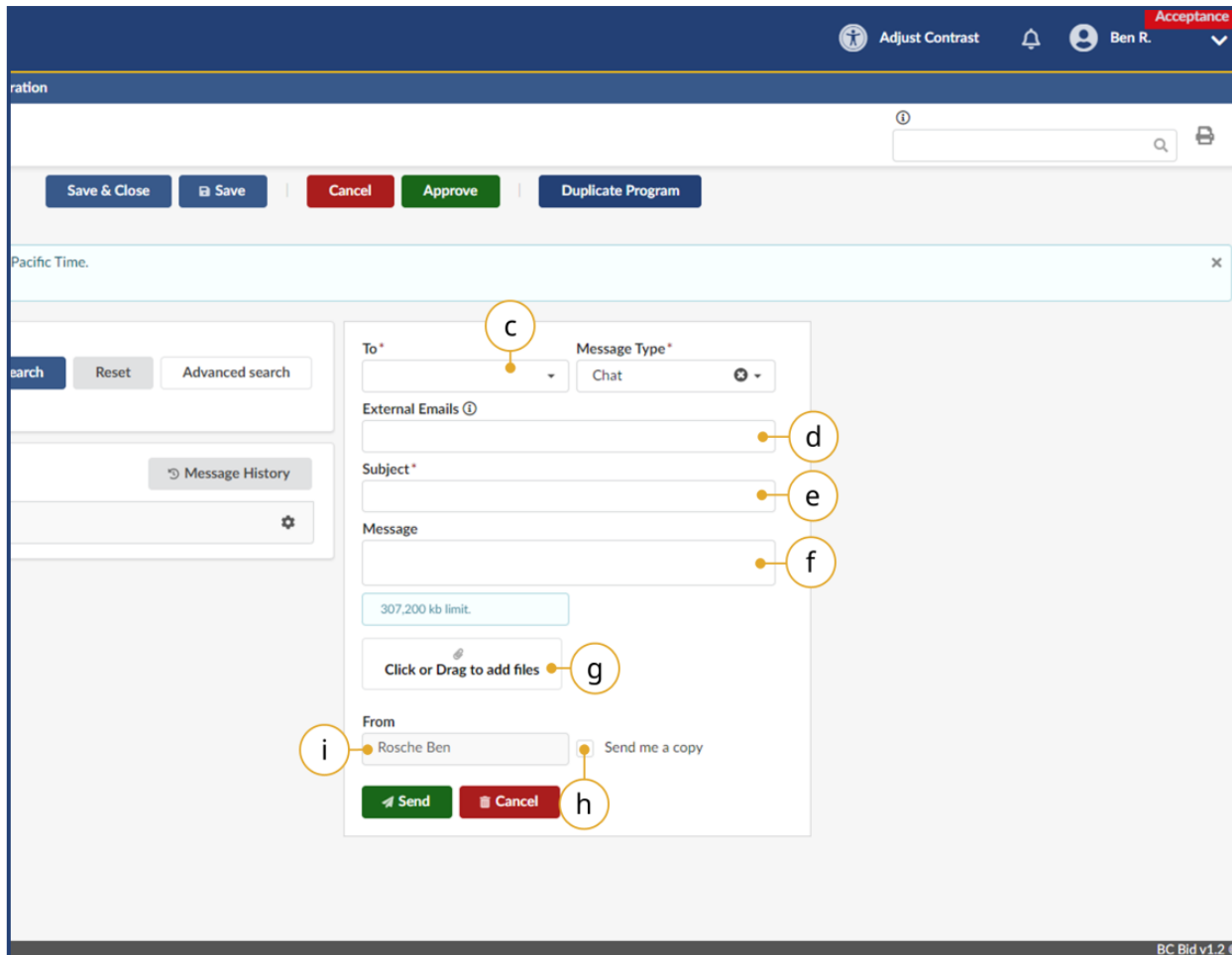
Code is a unique identifier of the Program and in the Program text box. Users should enter a label name specific to their organization.
The only Currency available is CAD.



5. Navigate to the **Documents** tab.
 - a. Click **Upload a Document**.
 - b. In the **Title** textbox insert a title.
 - c. Change **Document Status** to **Approved** if you are ready to make it accessible to the program.
 - d. Click the **Click or Drag to add files** button to upload files from Windows Explorer, or drag files from Windows Explorer, releasing when a green box appears.
 - e. *Optional:* In the **Summary** textbox, provide a summary of the attached document.
 - f. Click **Save & Close**.



6. *Optional:* Navigate to the **Forum** tab.
 - a. Use the search filter to filter messages.
 - b. Select **Compose** to create a new message.



- c. Use the **To** drop-down list to select one or multiple recipients.
- d. *Optional:* In the **External Emails** textbox, insert the email address of one or multiple external recipients.
- e. In the **Subject** textbox insert a subject.
- f. *Optional:* In the **Message** textbox insert a message
- g. *Optional:* Click the **Click or Drag to add files** button to upload files from Windows Explorer, or drag files from Windows Explorer, releasing when a green box appears.
- h. *Optional:* Click the **Send me a copy** checkbox to receive a copy by email.
- i. Click **Send**.



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

BRITISH COLUMBIA BCBid

Home Suppliers Sourcing

Program : 12345 - Strategic Planning

Save & Close Save Cancel Approve

Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time.
Click on save to update your selections

Identity Documents Forum Team 7 Activity Workflow

Select user(s)

Decision By	Profiles	Contact
Ben.Rosche@gov.bc.ca	Responsible (Program)* Contributor (Program) SME (Program)	Ben

[Page] [Missing texts] [Update texts] [D] [\$] [V] [E] [No configuration context audit] [Site map] [Legal mentions]

7. *Optional:* Use the **Team** menu to add members to the program.
 - a. In the **Select user(s)** drop-down list insert a user name.
 - b. Using the **Profiles** column drop-down list select one or multiple profiles for the user.

BRITISH COLUMBIA BCBid

Home Suppliers Sourcing

Program : BC Bid Test Code - BC Bid Test Program

Save & Close Save Cancel Init

Identity

- Documents
- Forum
- Team
- Activity 8
- Workflow 9

Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time. Click on save to update your selections

General Information

Status: Draft

Code: PRJ000106

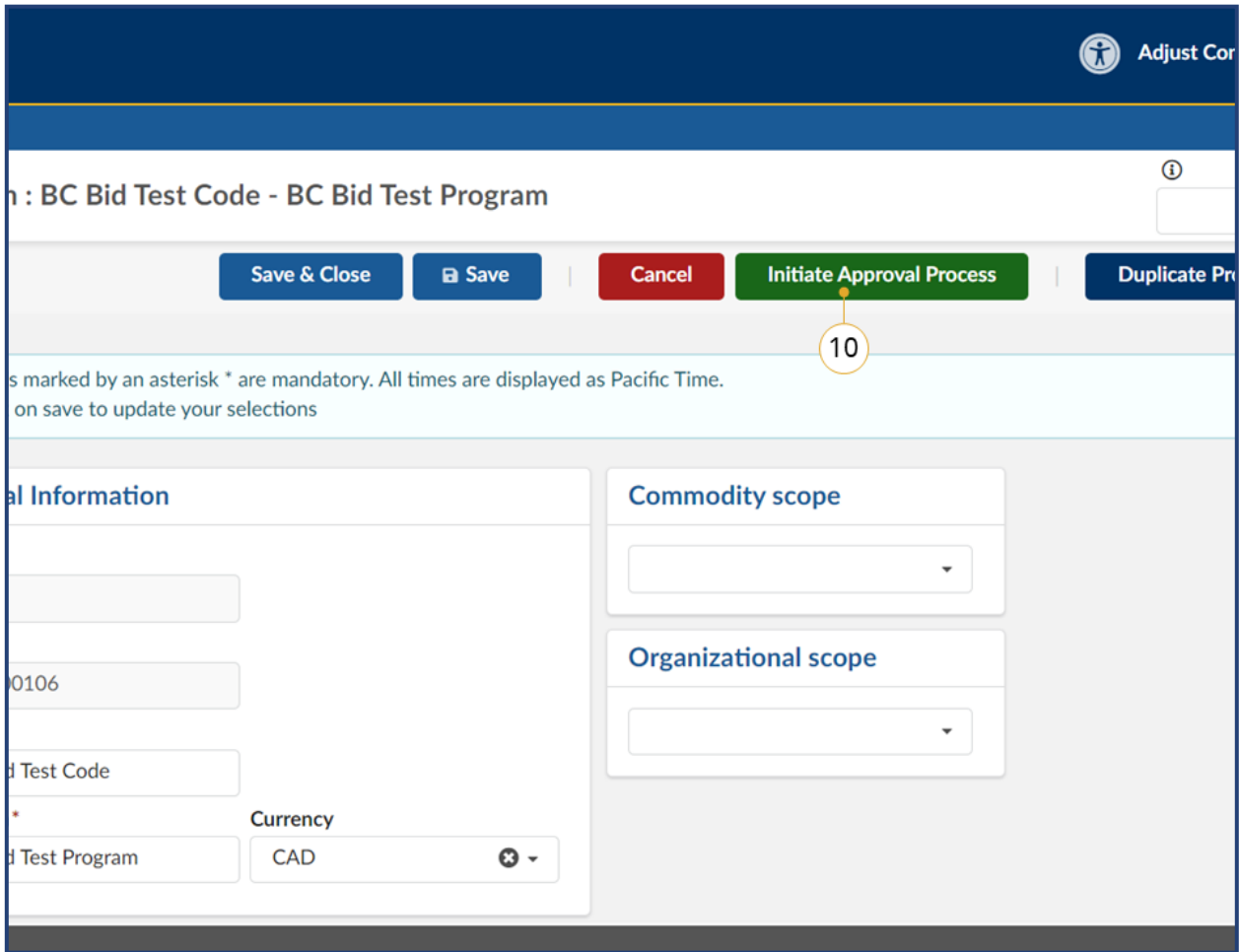
Code*: BC Bid Test Code

Program*: BC Bid Test Program

Currency: CAD

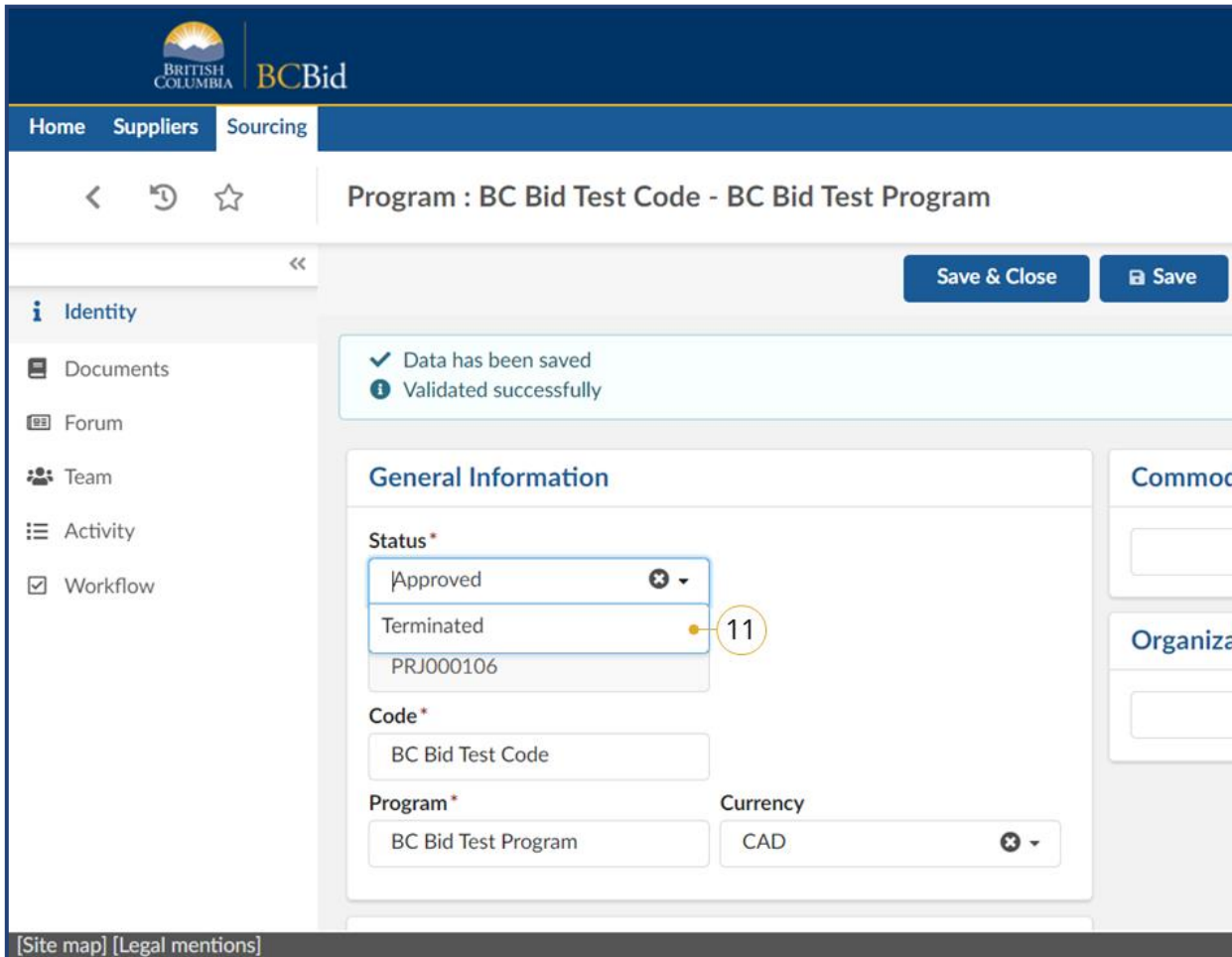
[Site map] [Legal mentions]

- Optional: Use the **Activity** menu to track opportunities linked to the program.
- 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.

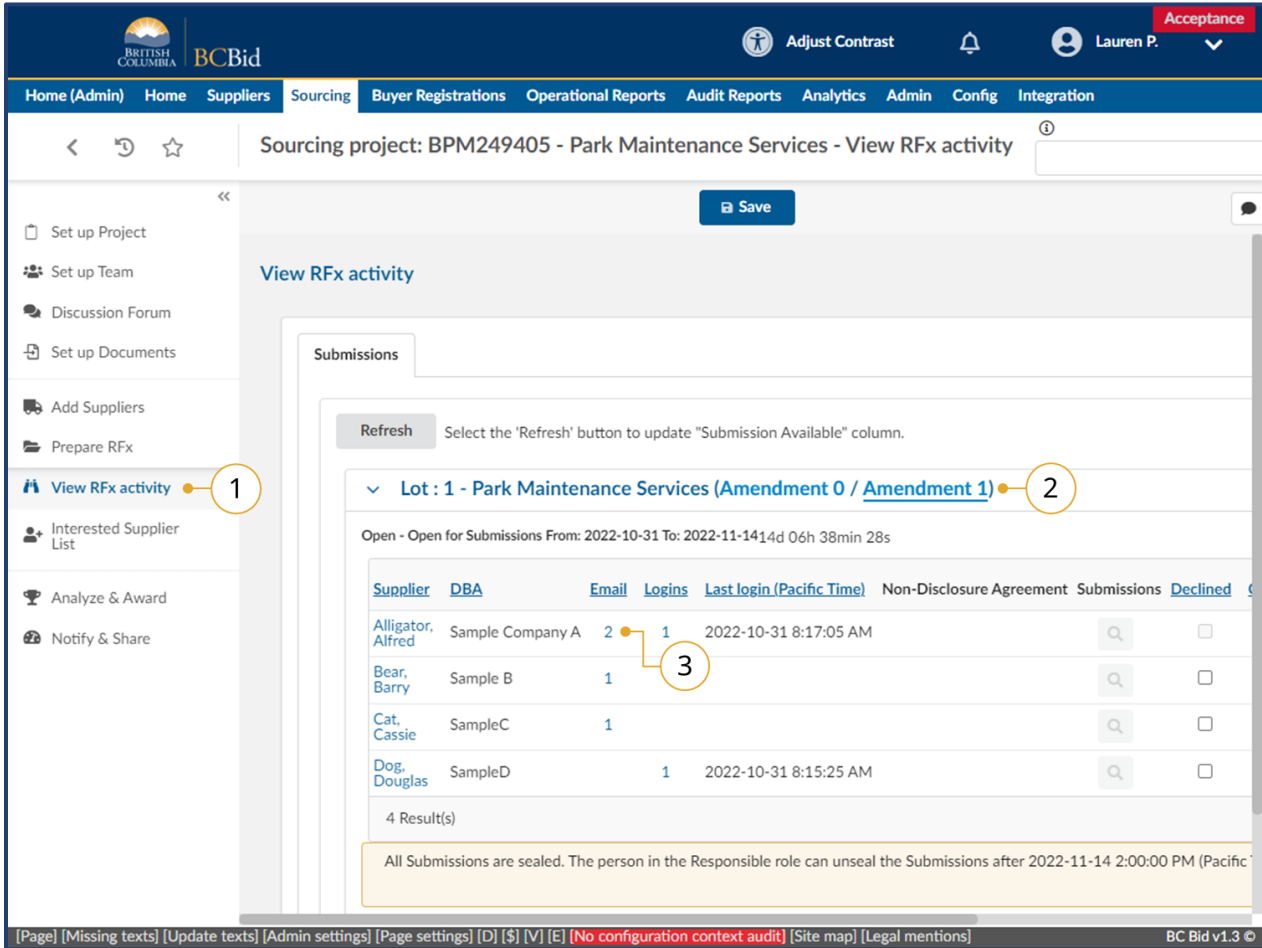


11. *Optional:* To change the status of a Program from Approved to Terminated, select **Terminated** from the Status drop-down.

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.

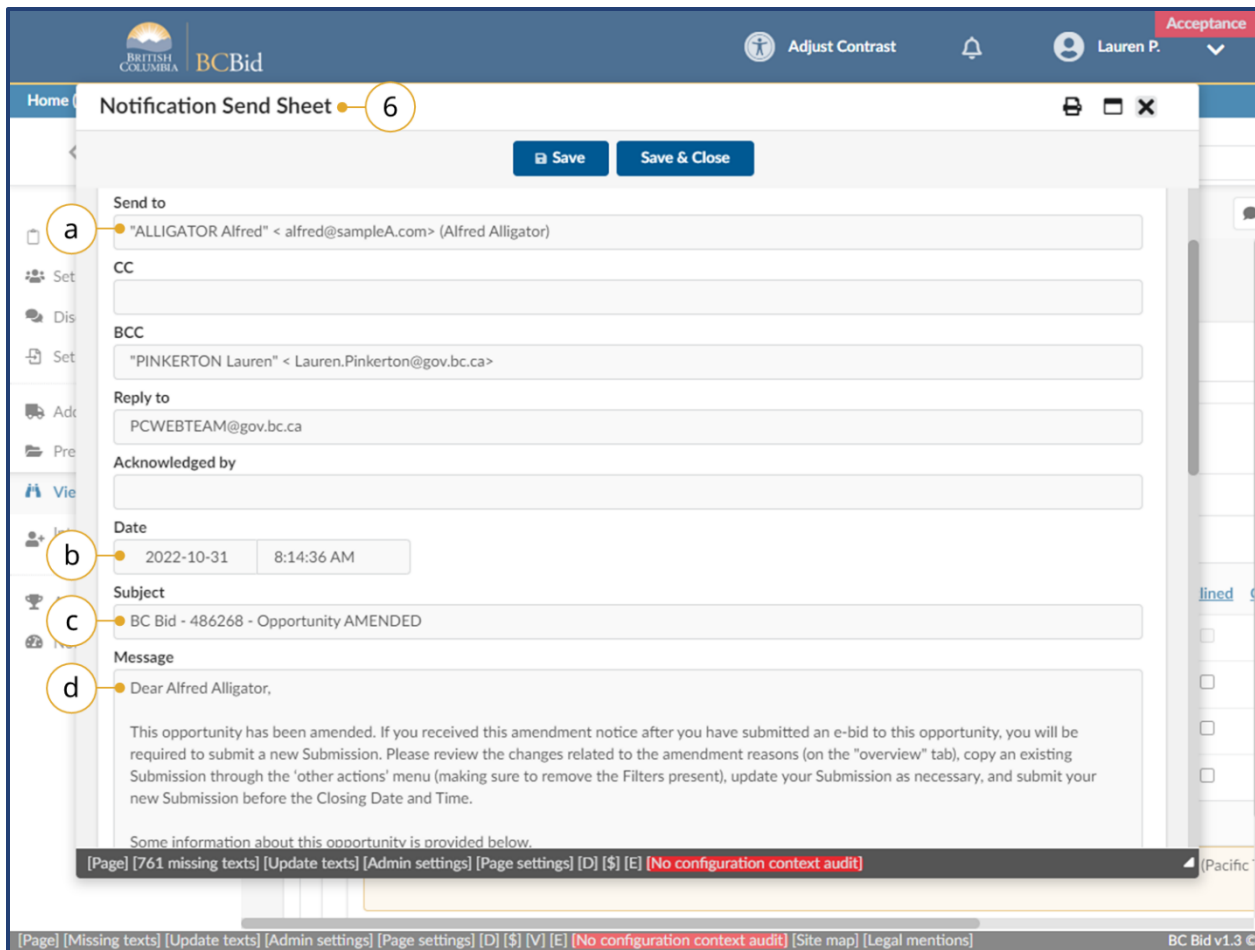
Note: All notifications will be grouped together in one email for the ease of suppliers use.

The screenshot shows the BC Bid system interface. At the top, there is a navigation bar with the BC Bid logo and various menu items like Home (Admin), Home, Suppliers, Sourcing, Buyer Registrations, Operational Reports, Audit Reports, Analytics, Admin, Config, and Integration. The main content area displays a 'Sourcing project: BPM249405 - Park Maintenance Services - View RFX activity' page. A 'Sent e-mails' dialog box is open, showing a list of sent emails. The dialog box has a title bar with 'Sent e-mails' and a 'Save' button. Below the title bar, there is a section for 'Amendment' with a dropdown menu set to 'Park Maintenance Services - 1'. The main part of the dialog box is a table with the following columns: ID, Date, Subject, and RFX Status. The table contains two rows of data:

ID	Date	Subject	RFX Status
83,957 ALLIGATOR Alfred	2022-10-31 8:17:05 AM	"ALLIGATOR Alfred"	Sent
83,953 ALLIGATOR Alfred	2022-10-31 8:14:36 AM	"ALLIGATOR Alfred"	Sent

Below the table, it says '2 Result(s)'. A circled '4' is placed next to the first row, and a circled '5' is placed next to the 'Subject' column of the second row. At the bottom of the dialog box, there is a footer with various system messages and a gear icon.

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: 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

[View the Help Desk Self-Help Resources](#)

Appendix 2: Training Video Links

Video Name	URL (Link)
Navigating the Public Portal	https://youtu.be/loEjkEXP6wY
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/HDFk6Li_N2s
Commodity Codes	https://youtu.be/TLYaL76-4YE
How to Create a MUL	https://youtu.be/mtvEJ75ZZdY
Copy Sourcing and Status	https://youtu.be/1QLiIGQBVo4
Set up Team	https://youtu.be/PCAxNIQJPOw
How to use the Discussion Forum	https://youtu.be/730QwYbAo7o
Set up Documents	https://youtu.be/nvIgeU-vQaY
Add Suppliers Overview	https://youtu.be/Mjlgs-A8Jkk
Adding Suppliers Not on a Qualified Suppliers List	https://youtu.be/ia26IYmCFk
Removing suppliers and extracting a suppliers list	https://youtu.be/UxQPRLiUPyg
Creating a new supplier	https://youtu.be/tLIDSA5QRSk
How to Add from a Multi-use List Qualified Suppliers List	https://youtu.be/Lx3GxkyTsSw
Additional RFx Info	https://youtu.be/GS8ps2erpB8
How to add documents to an opportunity	https://youtu.be/PDQ95HzdTjo
Approvals	https://youtu.be/S-ki_HIPD8w
Approvals Workflow and Issuing an Opportunity	https://youtu.be/65sLww_Ytmo
Issuing an Addendum	https://youtu.be/rbT6gU7o9a4
Issuing an Amendment	https://youtu.be/omumJYSv5YM
Upload submissions for open opportunities	https://youtu.be/9yxMVEpMIwc
Manually Close a Posted Opportunity	https://youtu.be/8xBSF77TyRY
Uploading Submissions	https://youtu.be/bB_bc6qsQyY
Unsealing and Downloading Submissions	https://youtu.be/Wn049OeEjgs

Video Name	URL (Link)
Awarding a Contract	https://youtu.be/lpN3E5tM3zc
Sending list results notifications to Suppliers	https://youtu.be/qvdxBTNKw5s
Sending award results notification to suppliers	https://youtu.be/MRqtjl6rHTk
Creating a Contract Award Summary	https://youtu.be/ypD5hRRXqMs
How to transfer a qualified suppliers list from a SURFQ	https://youtu.be/AqKoWrFxpjg
How to create a new lot	https://youtu.be/rtlXq104On8
Close an opportunity	https://youtu.be/9WnvXrprEWA
Close a Sourcing Project	https://youtu.be/h69SOjglbtM
Creating a contract award notice	https://youtu.be/lvdfwNE6zUo
How to create a Program	https://youtu.be/BweOKTfZC2o

Appendix 3: Operational Reports

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..

Once 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 Status** 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)
- 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

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	✓	✓	✓	-	
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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.

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