BCBid

Ministry Buyer Guide

BRITISH COLUMBIA

Introduction

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

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

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

- Buyers can set up opportunities, communicate with team members and suppliers, and post 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.

Table of Contents

General Interface

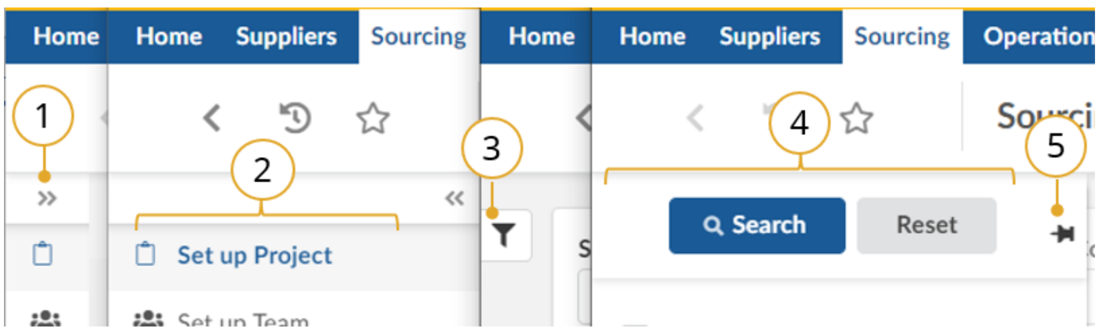
This section describes some general functionality of BC Bid.

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



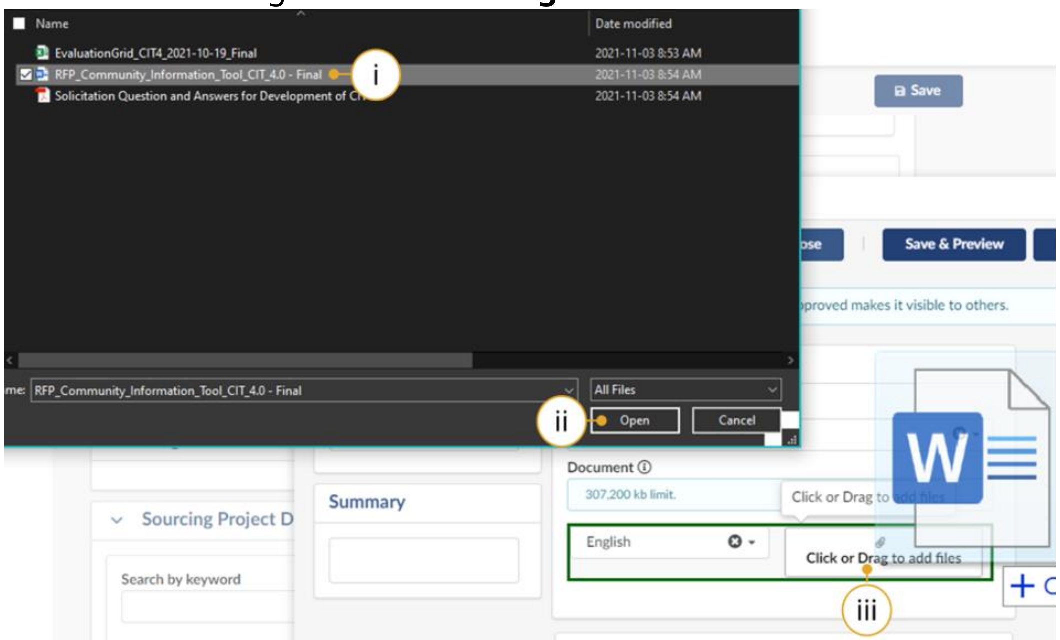
1. The left-hand menu can be expanded or collapsed by selecting the **double arrow**. When collapsed the icon related to each step is visible, hover over the icon to see the name.
2. Expanded.
3. Filters on tables can be expanded by clicking the **funnel icon**.
4. Expanded.
5. Click **pin icon** to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

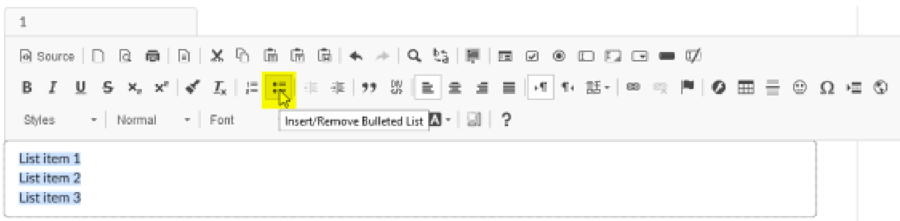
File uploads are limited to 500 MB. An individual file of 500MB can be uploaded. If multiple files are being uploaded at the same time, the total size must also be under 500 MB. File types include common business application file types. There are an unlimited number of attachments.

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.

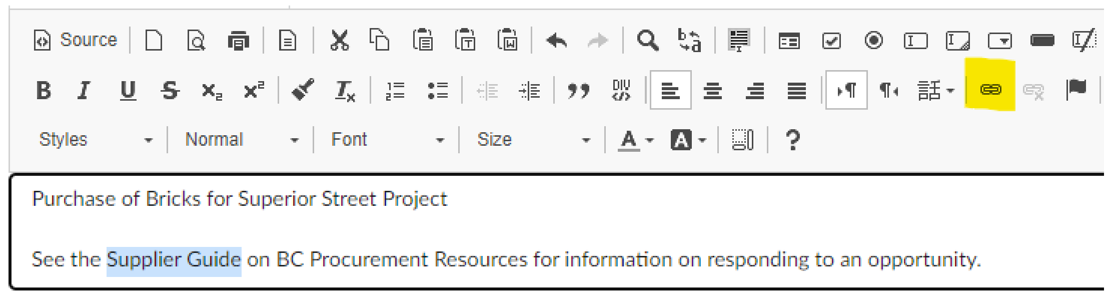


Close to Save Using “X”

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.

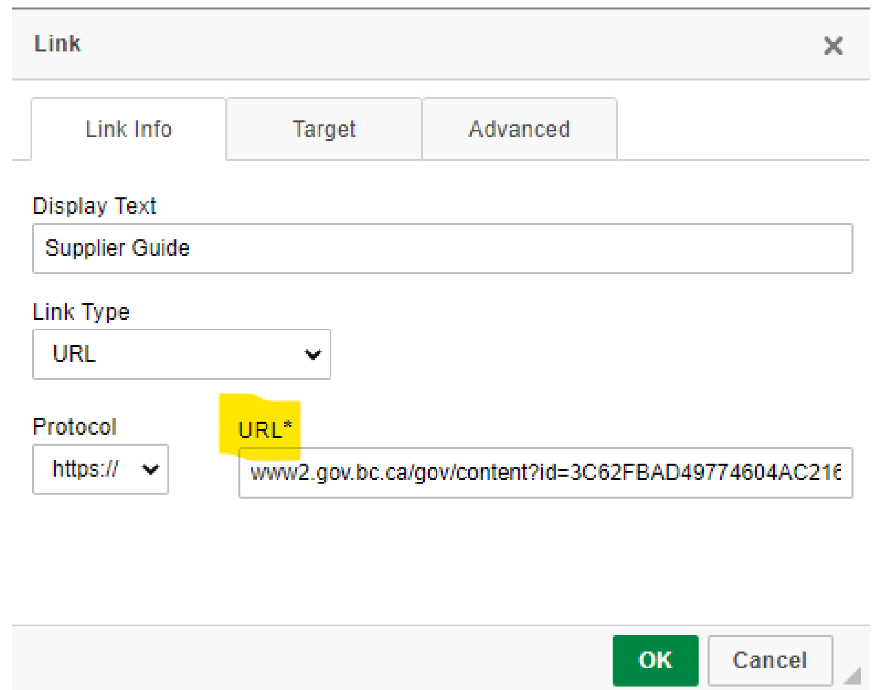
Adding a Link to a Text Field

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.



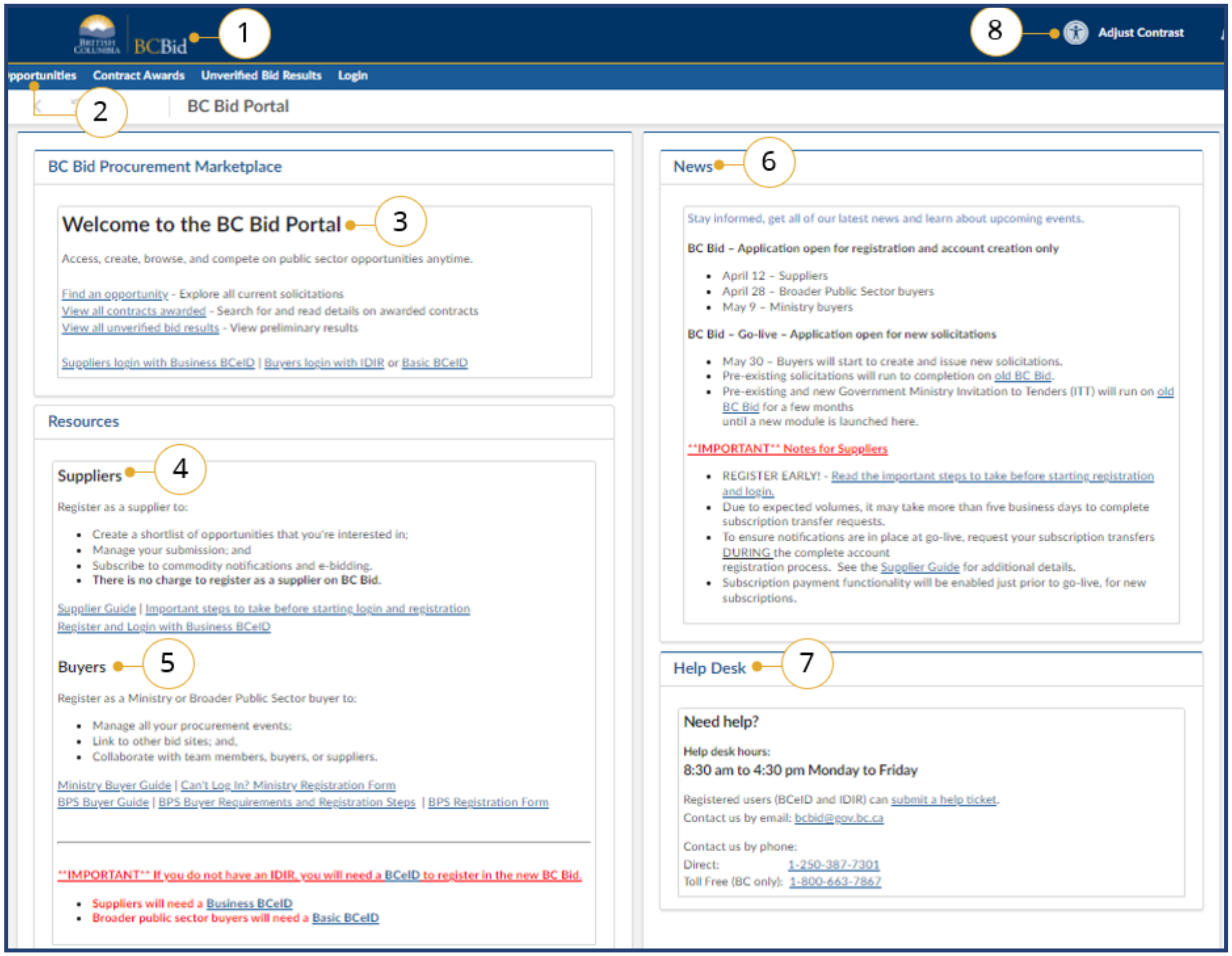
Copy and Edit a Link

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

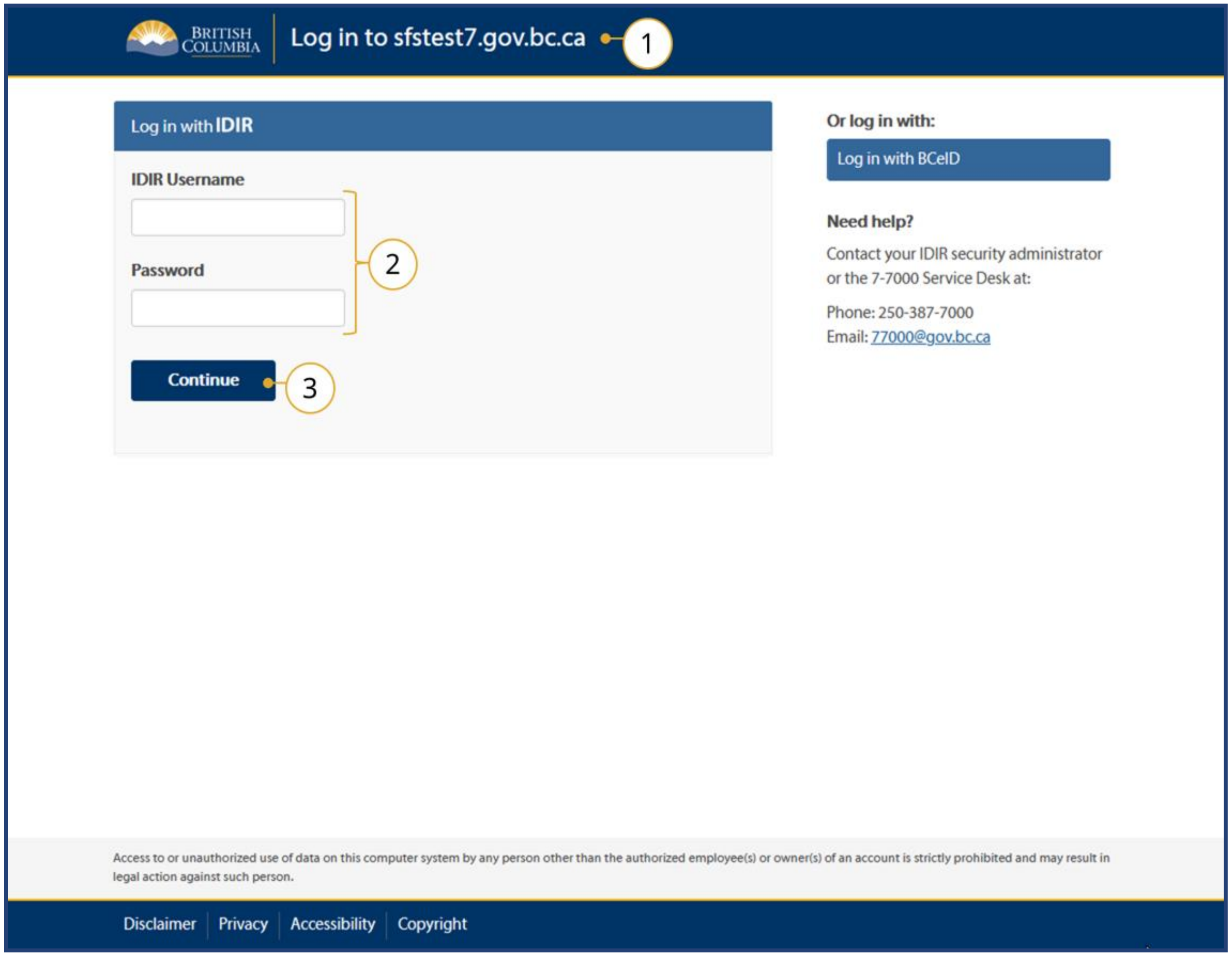
URL: https://bcbid.gov.bc.ca



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



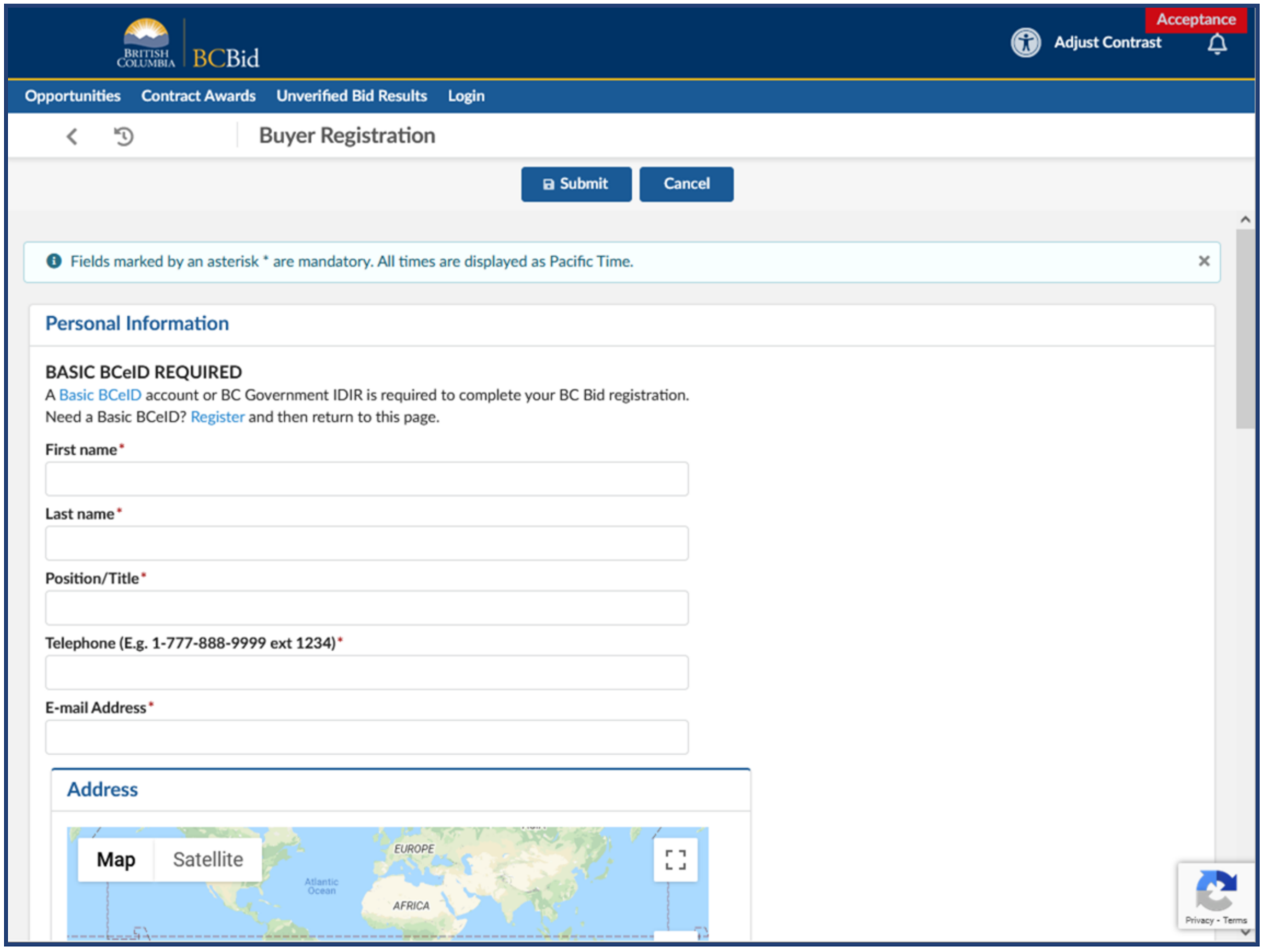
1. Navigate to BC Bid to see the **Login Screen**.
2. Enter your IDIR Username and Password.
3. Click **Continue**.

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



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.

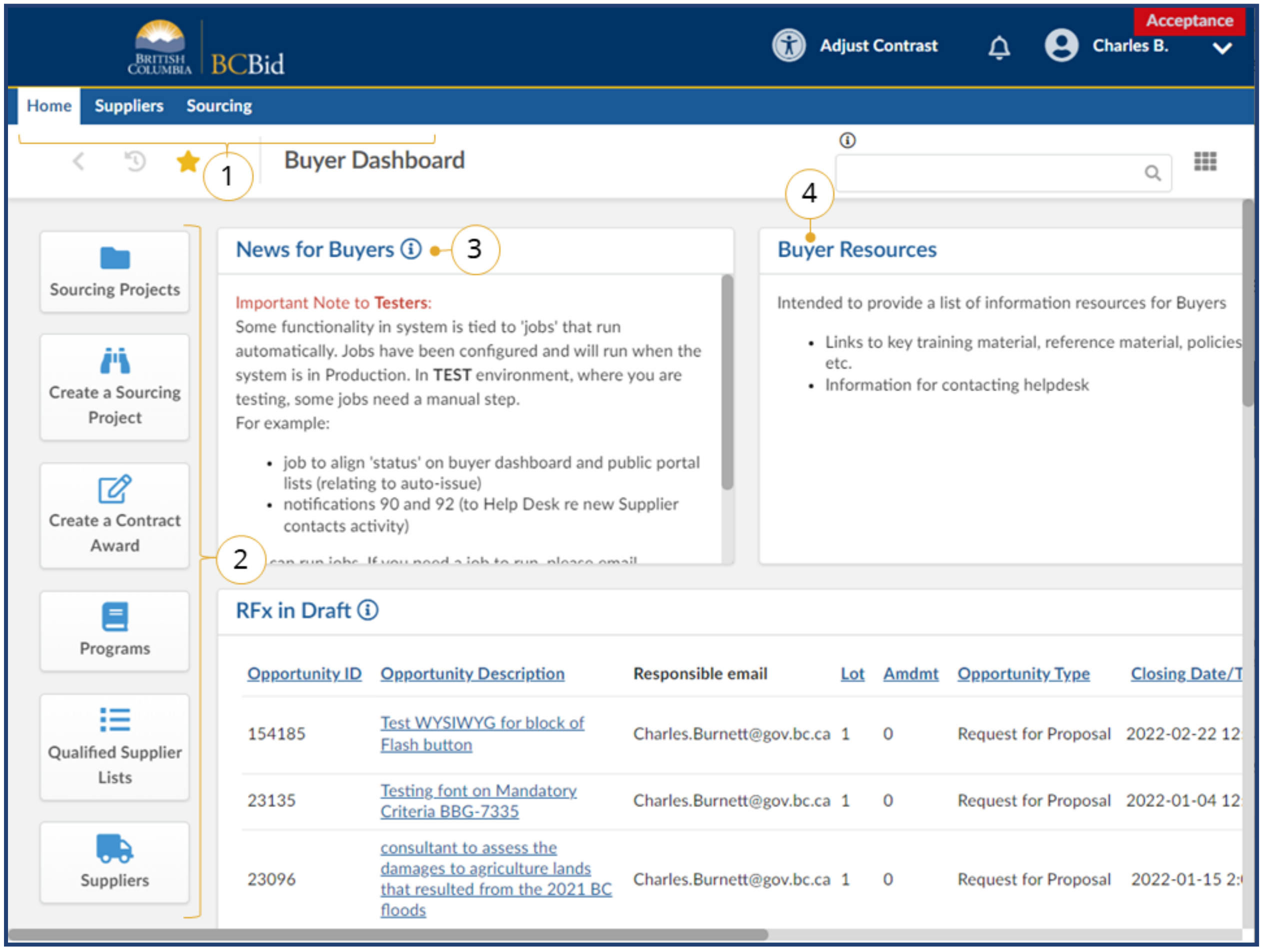
In these cases, you should first confirm that you have a functioning IDIR. Then you will need to fill out and submit the Buyer Registration Form. The BC Bid Help Desk will review your submission.

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.

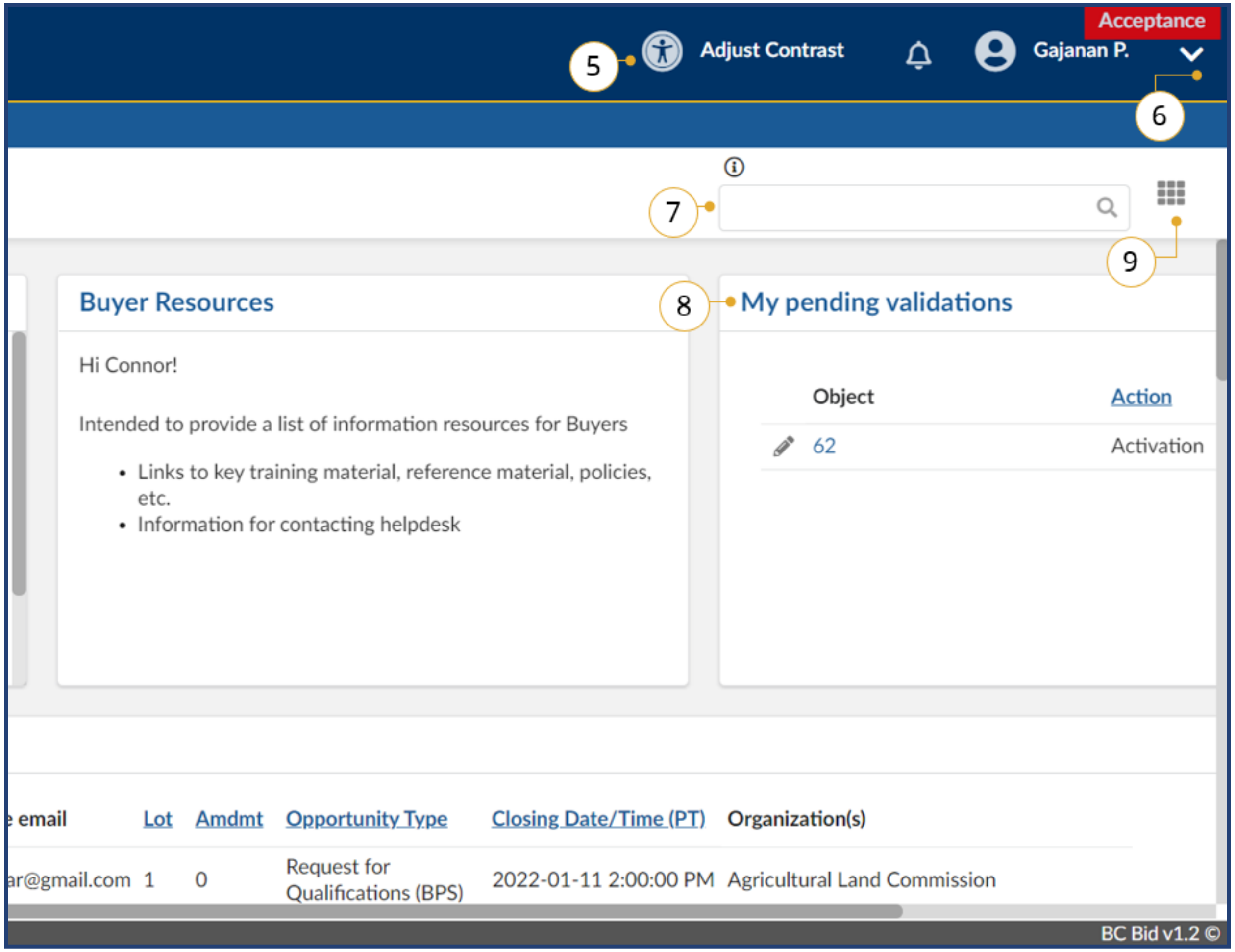
Buyer Dashboard

Home – Buyer Dashboard

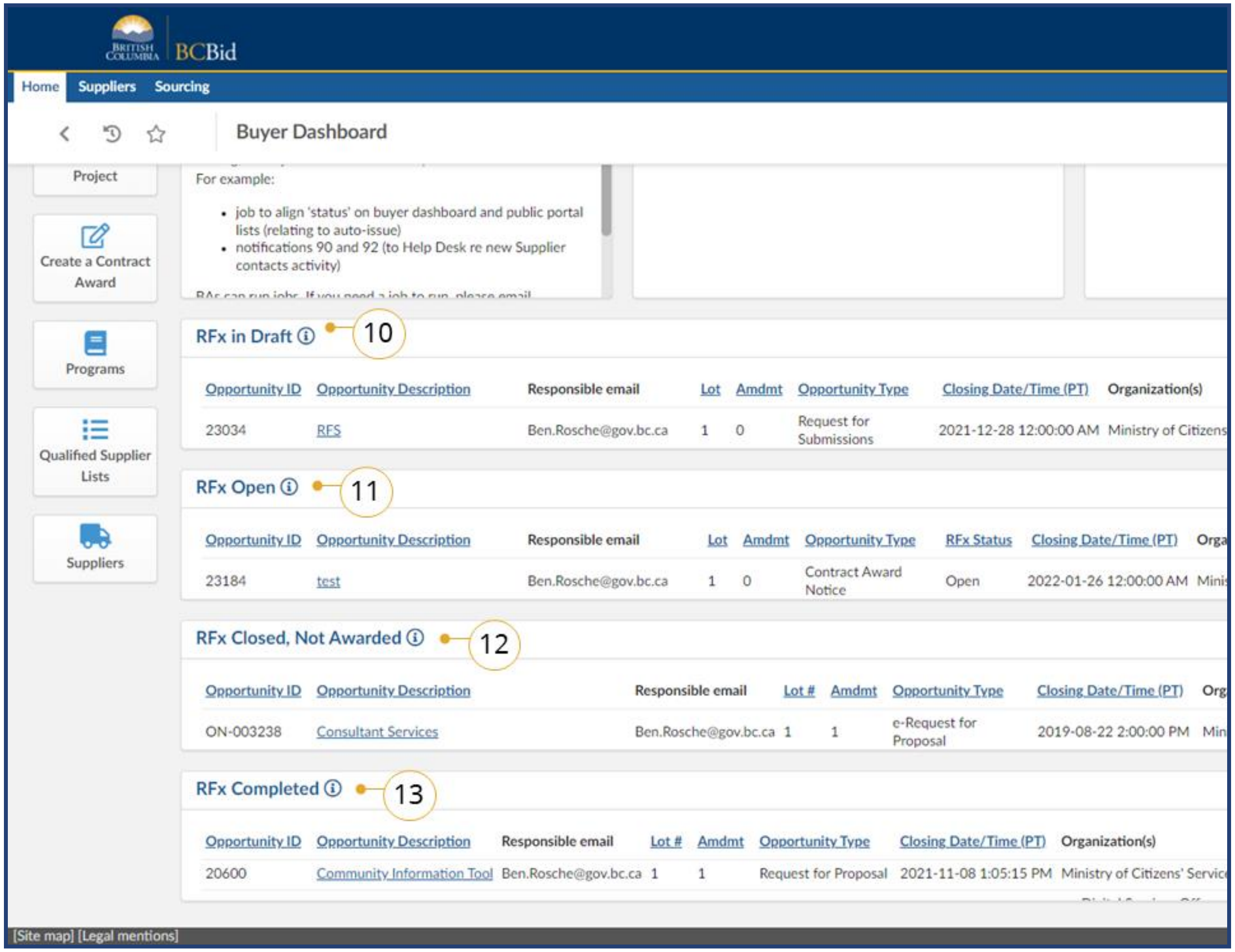
The Buyer Dashboard is the home page when buyers log in to BC Bid application. This section describes the layout and content of the home page.



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.



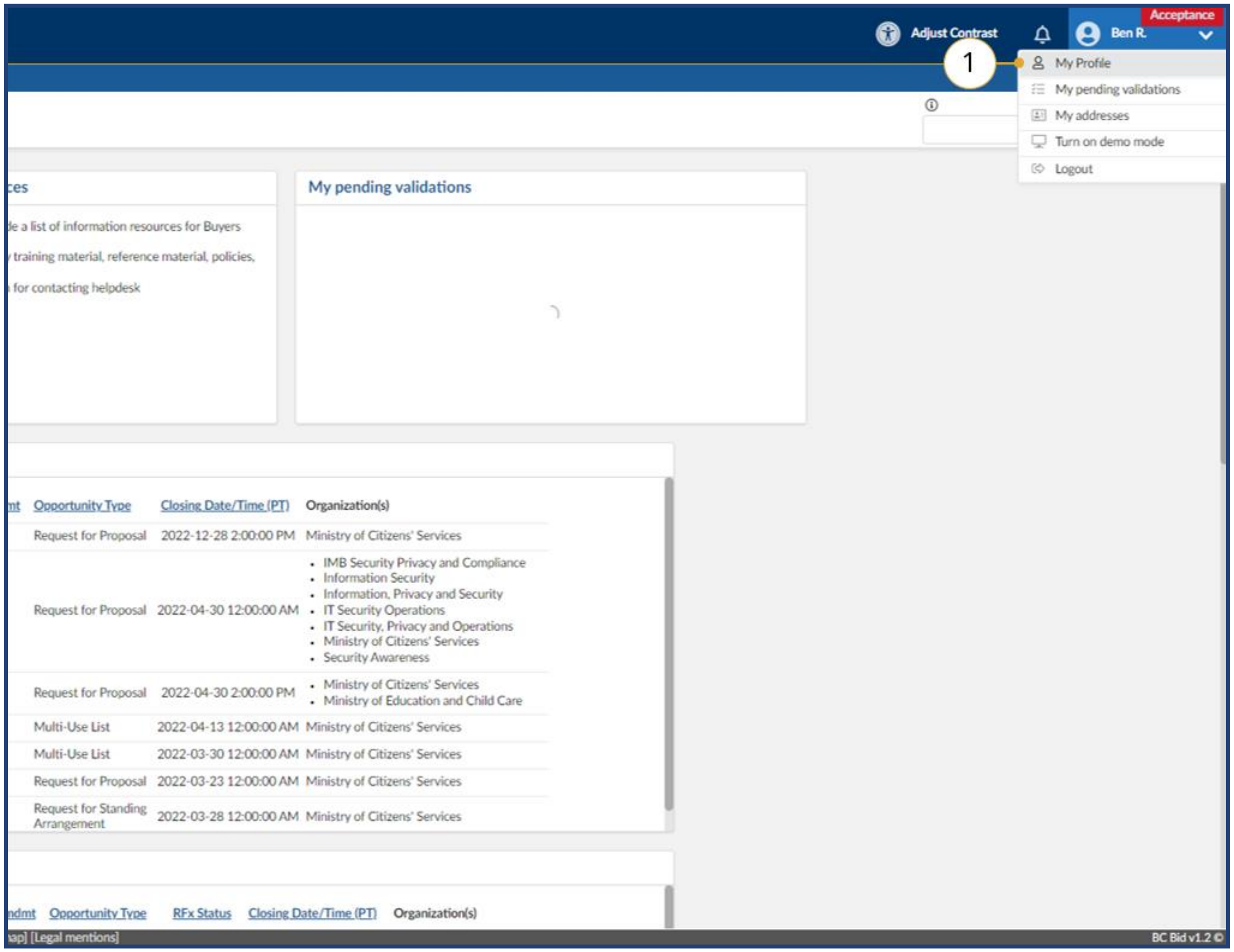
10. **RFx in Draft** Shows all draft Opportunities that the Buyer is involved in.
11. **RFx Open** Shows open projects and/or RFxs where you are a team member. These are sorted by soonest Closing Date at the top.
12. **RFx Closed, Not Awarded**: Shows closed projects and/or RFxs where you are a team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

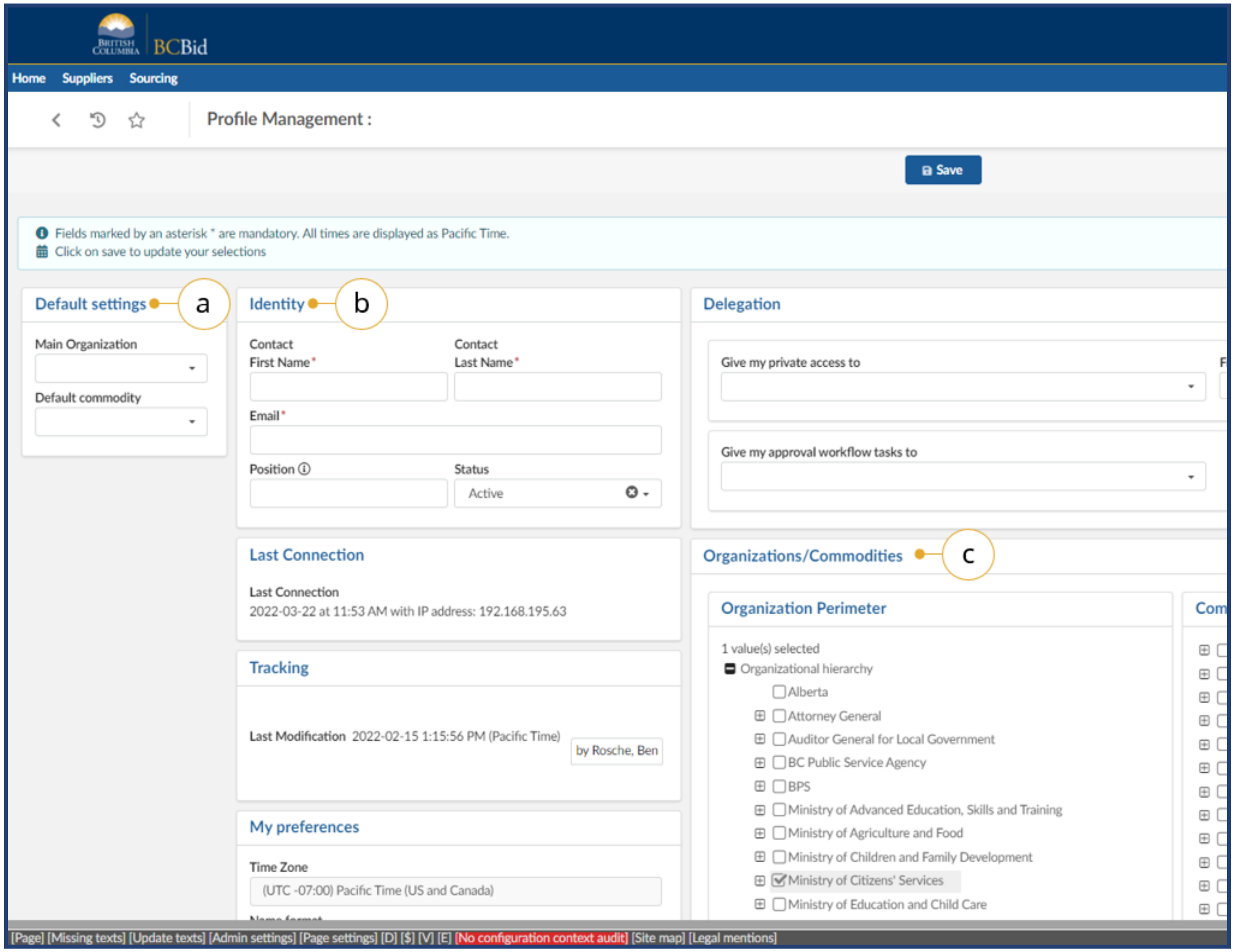
This section provides the steps for updating your profile in BC Bid application. It is not necessary to update or complete the profile, but there are features that may be useful to you. For example, if you usually buy for only one organization, that detail can be prepopulated in the Default settings.

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

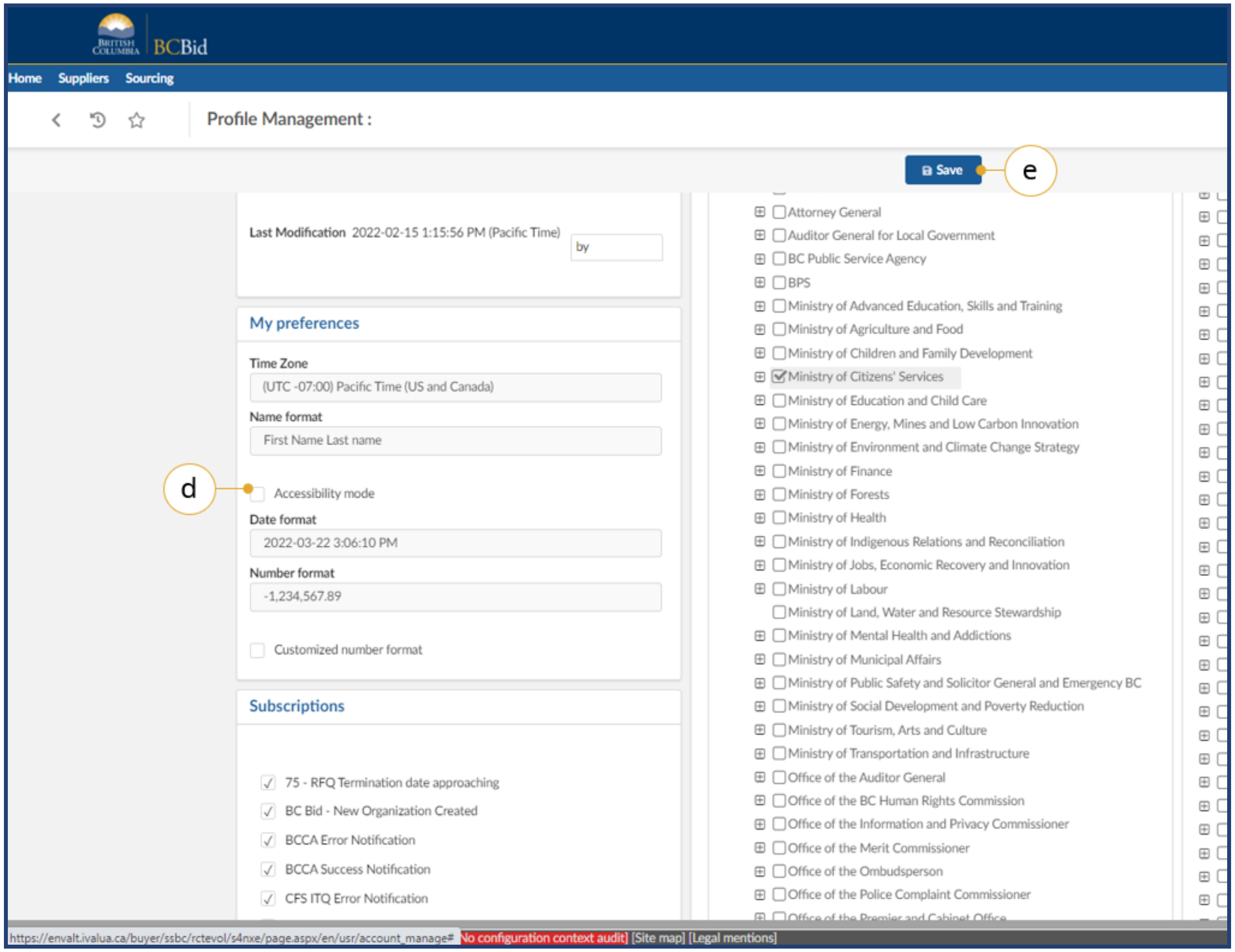
Edit My Profile



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

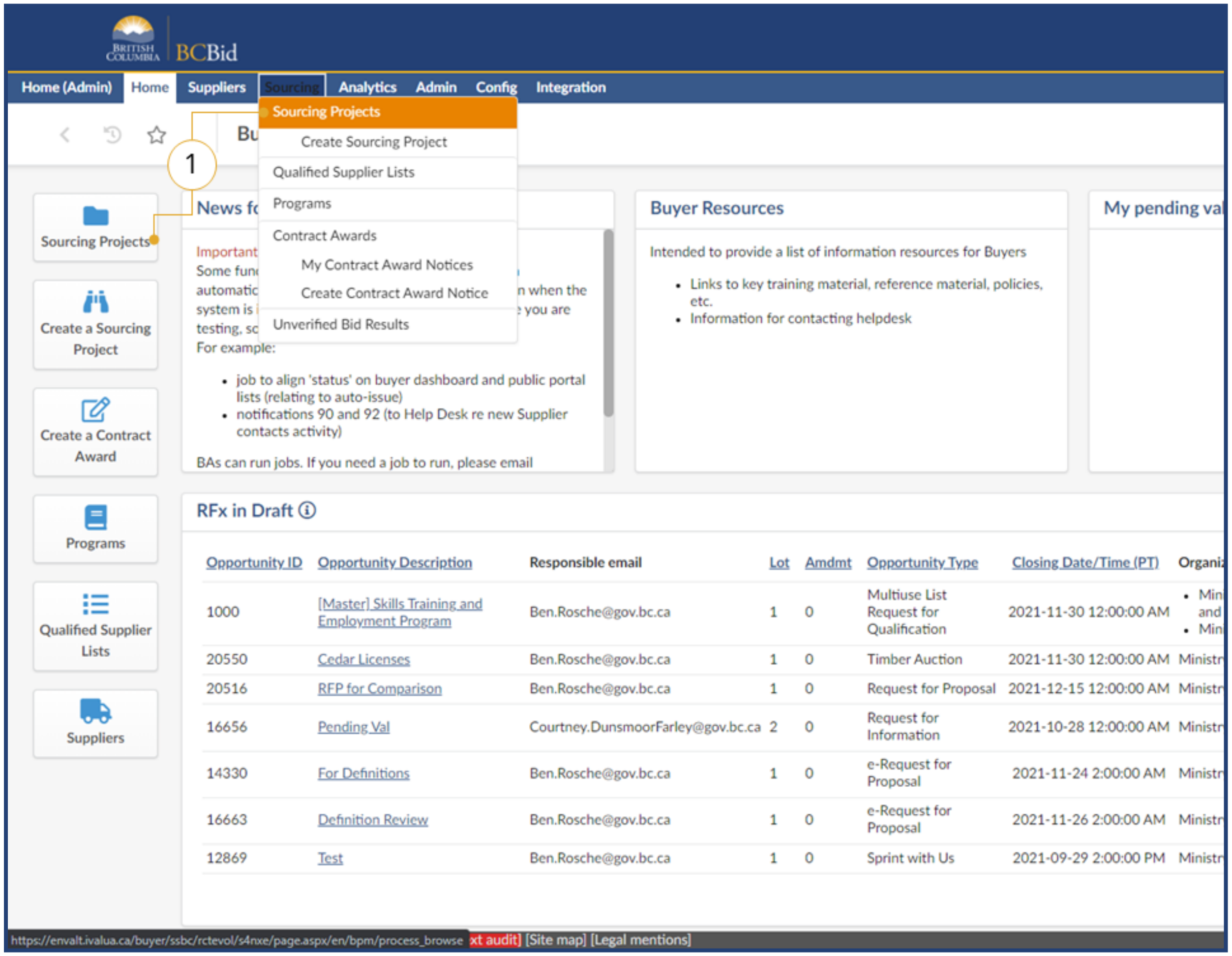


2. Available fields include:
    a. **Default Settings**: Only the option selected in the Main Organization drop-down list will be prepopulated in future Sourcing Projects.
    b. **Identity**: The details (except for Position) entered here will be prepopulated in future Sourcing Projects.
    c. **Organizations/Commodities**: This section is controlled by Administrators. So, it is not applicable to any user.



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

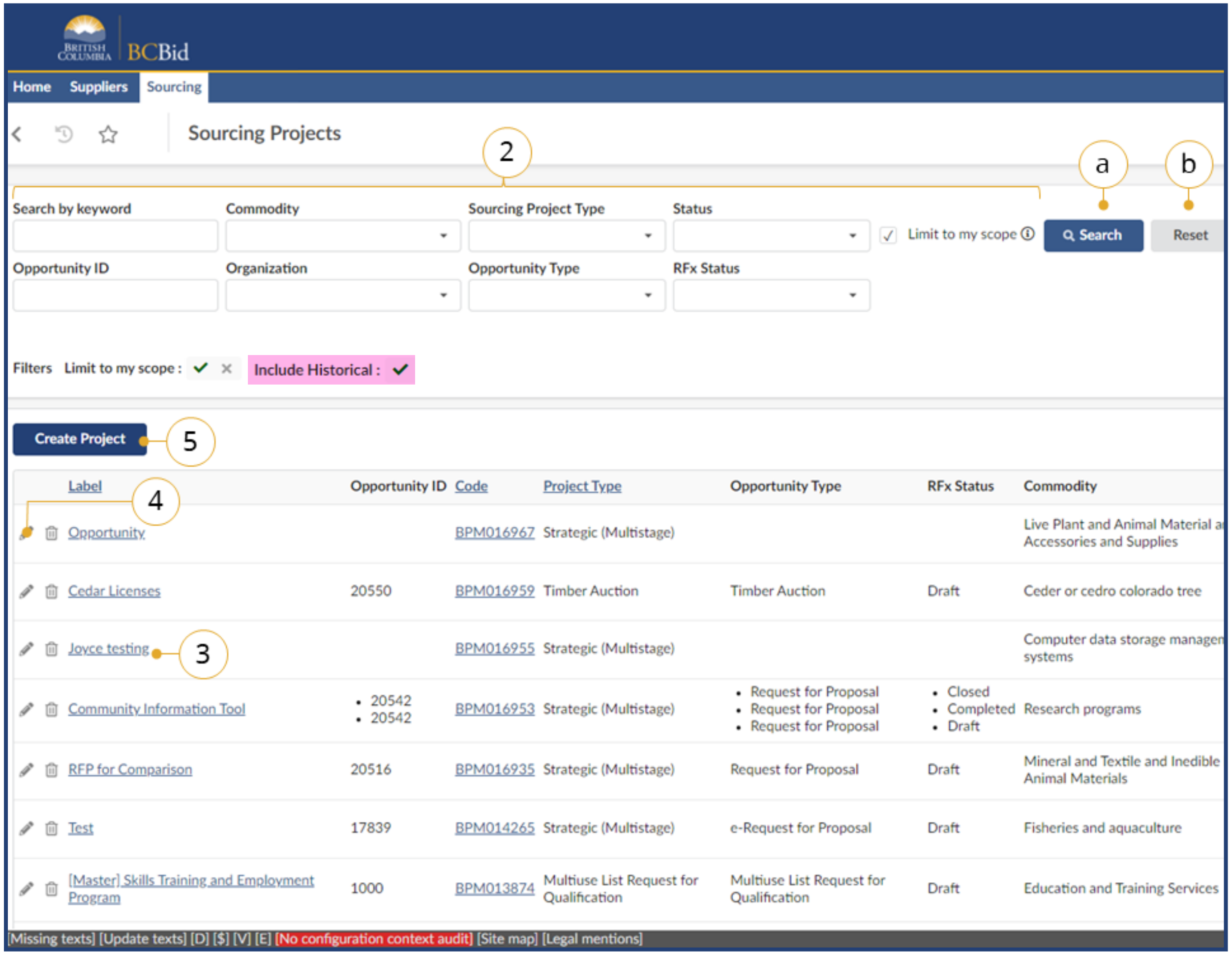
Explore Sourcing Projects



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.

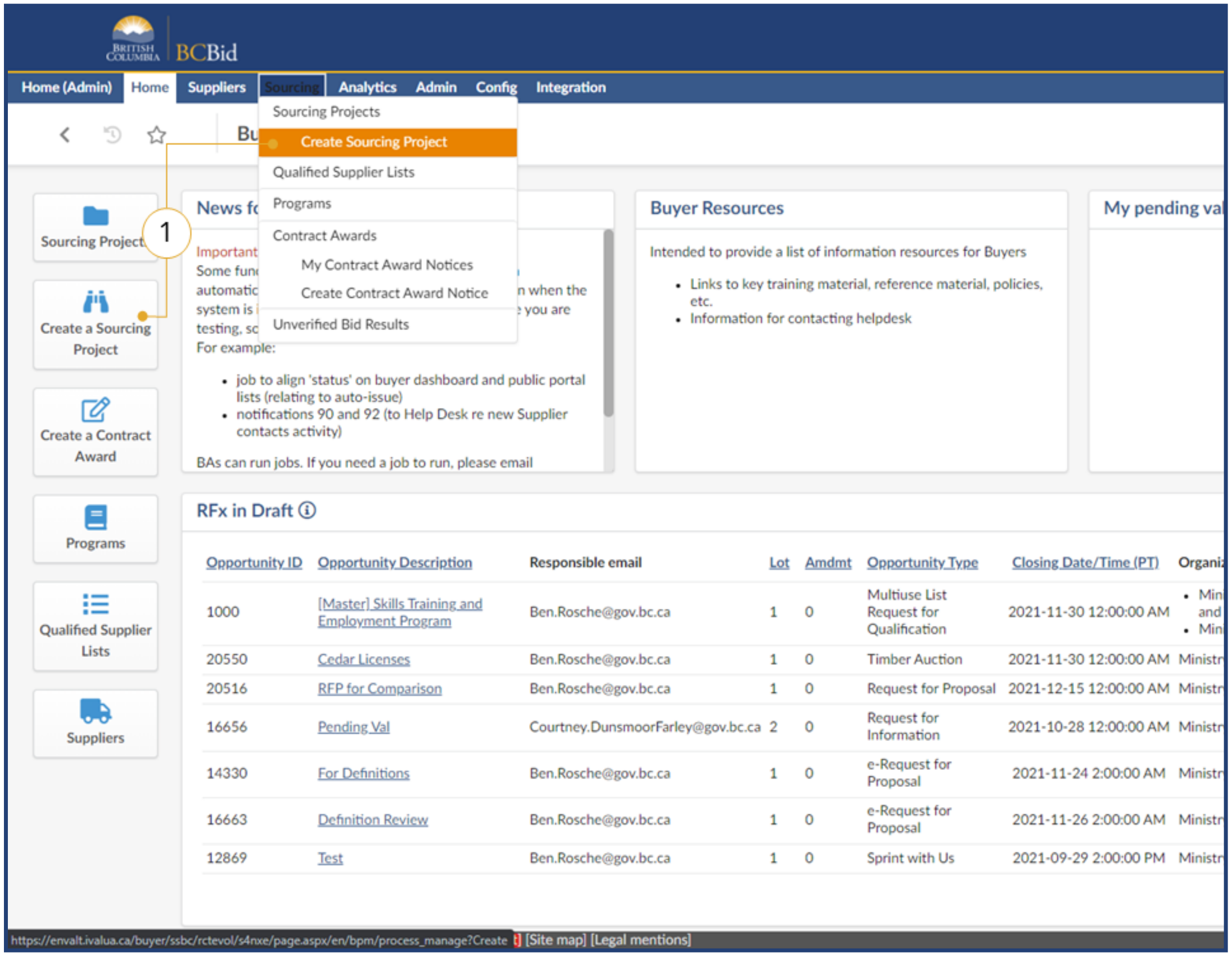


2. In one or multiple searchable fields, enter text or use the drop-down lists to filter the search options.
   a. Click **Search**.
   b. To start a new search, click **Reset**.
3. To read-only, click the **Label** or **Code** of the Sourcing Project.
4. To edit opportunities click the **pencil** icon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

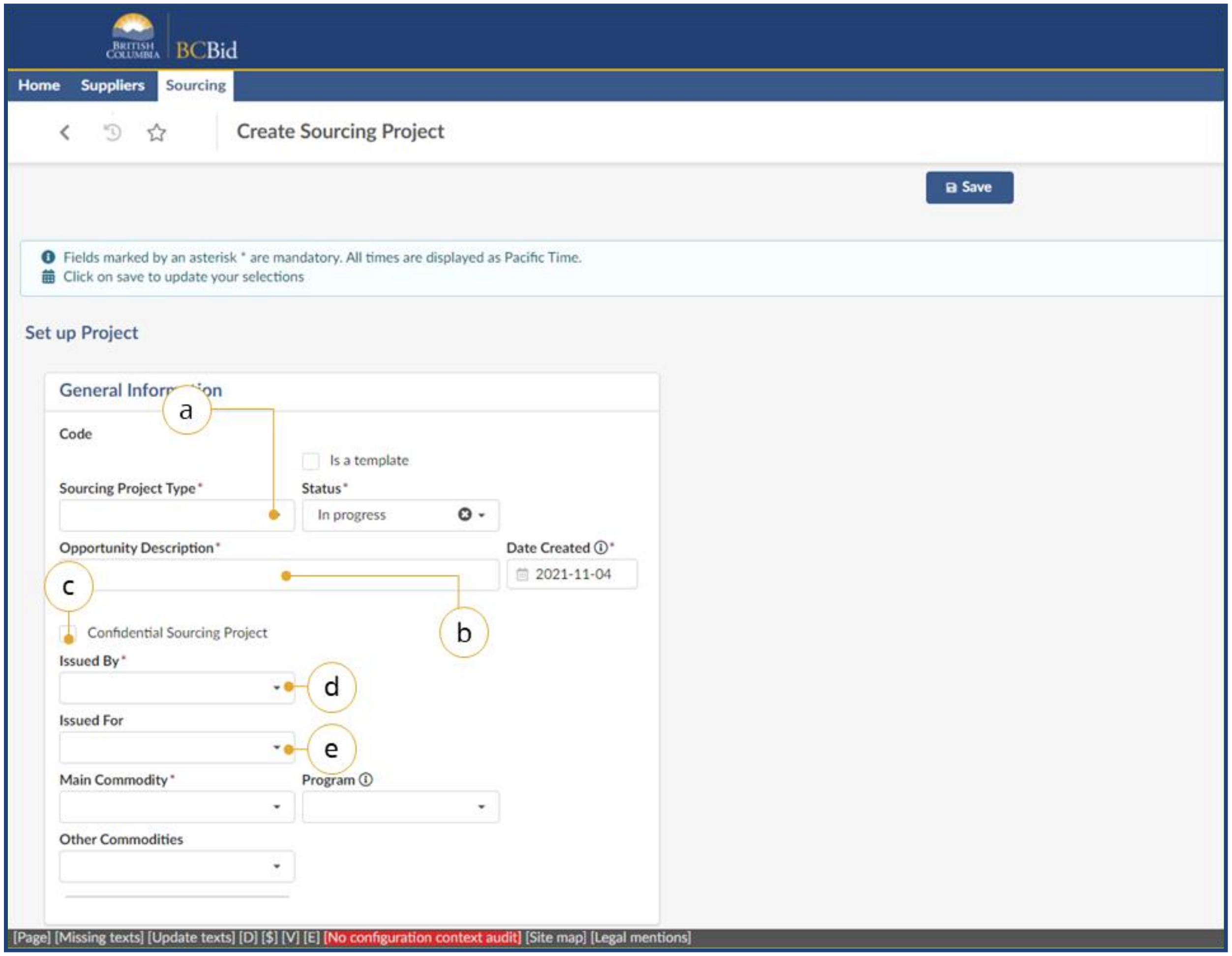
[How to Create a Sourcing Project]

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

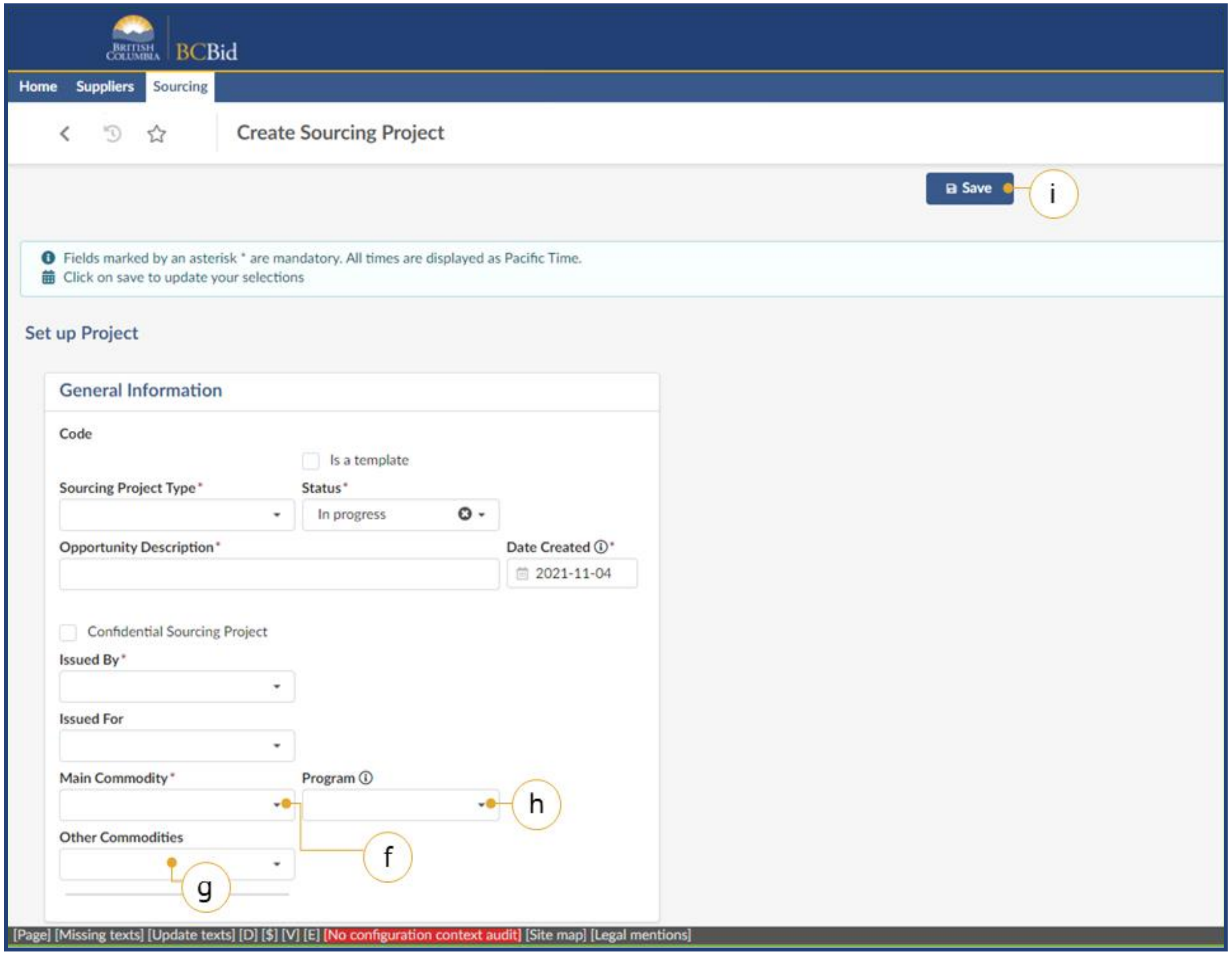
General Information Form

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



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.**

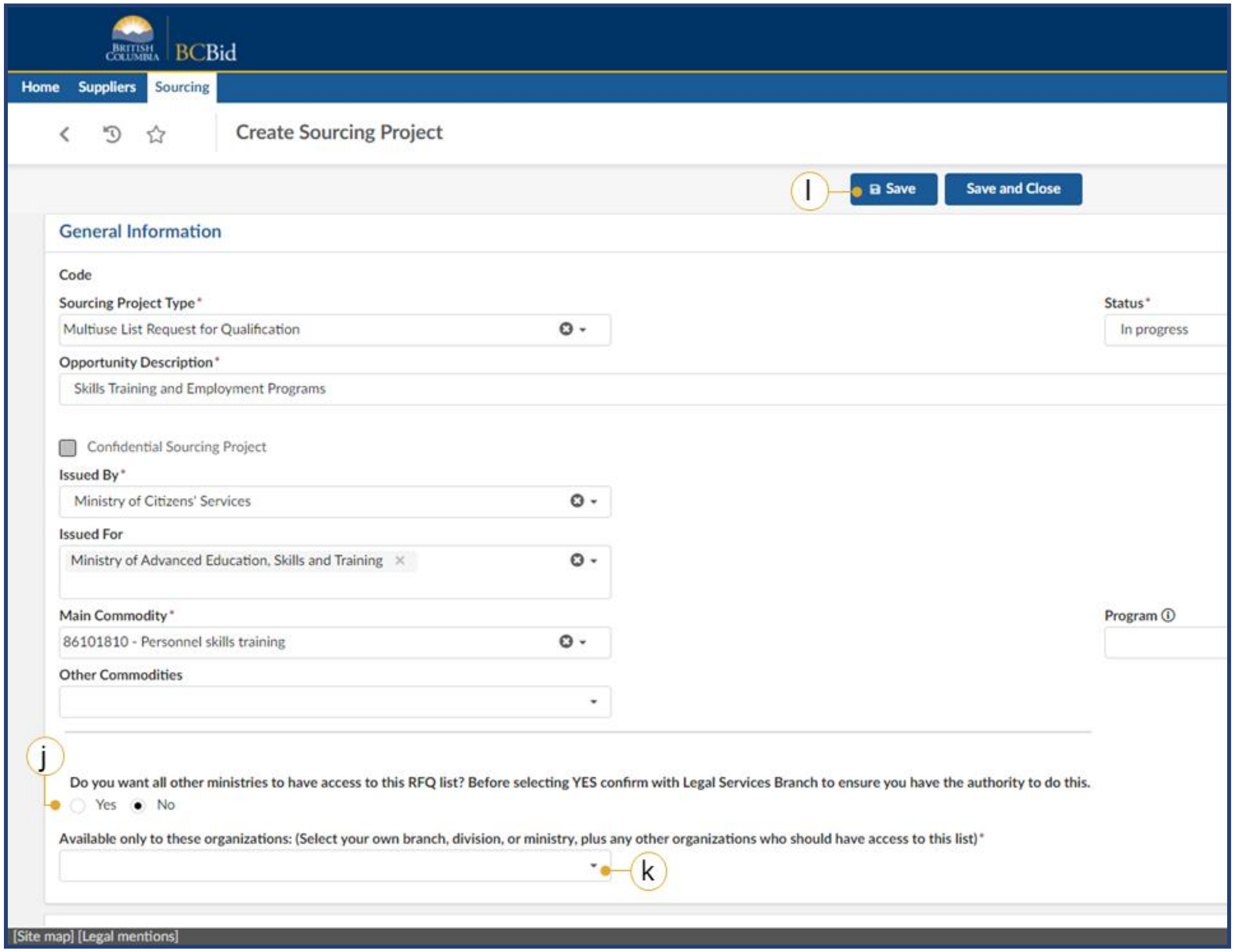


f. In the **Main Commodity** drop-down list, select the appropriate code at the appropriate tier, based on the purchase.
g. *Optional*: Use the **Other Commodities** drop-down list to select the appropriate commodities at the appropriate tier, based on the purchase. If a more detailed search is require, 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.

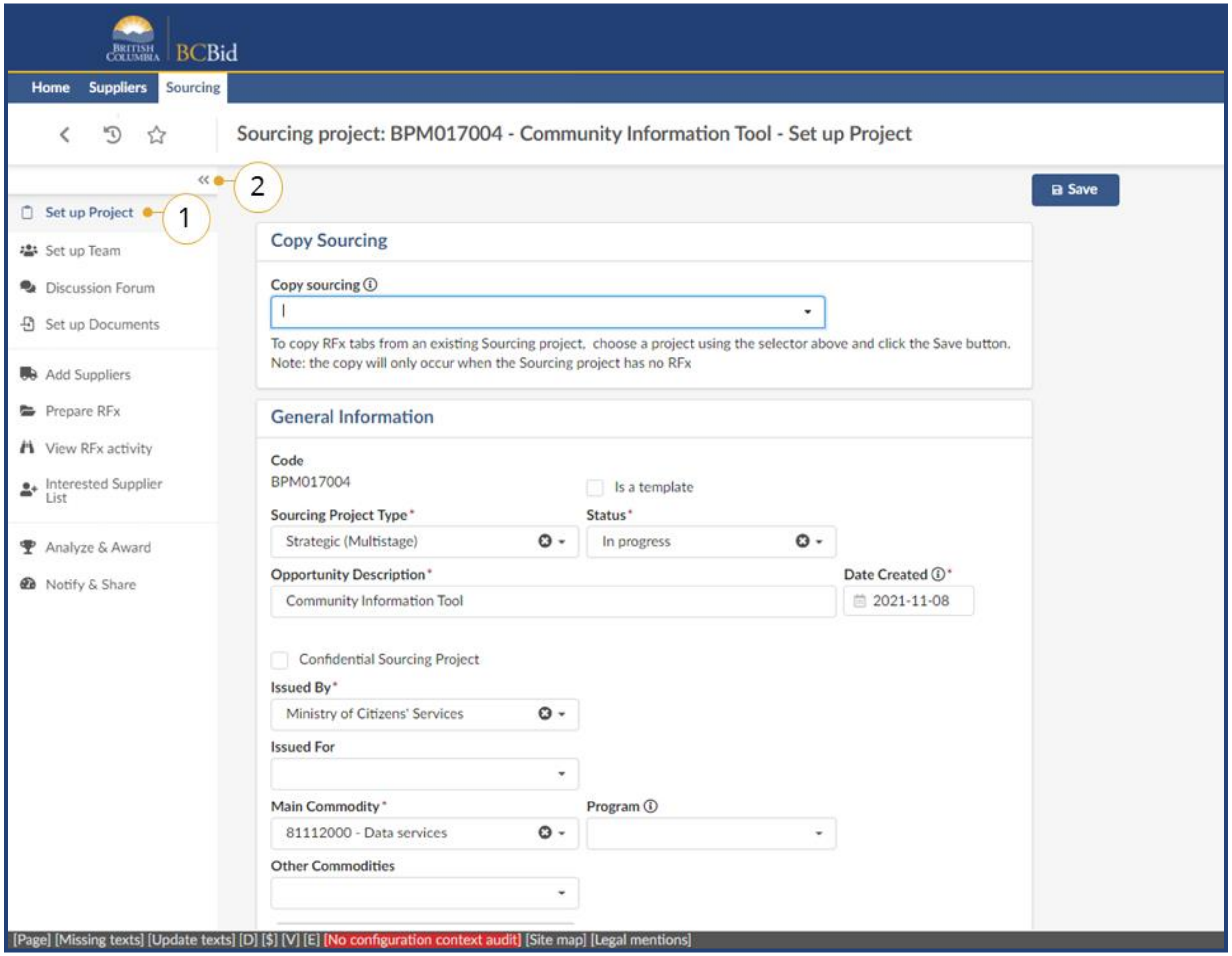
Note: If more than 5 organizations are listed, click the double arrow to view all.

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?**

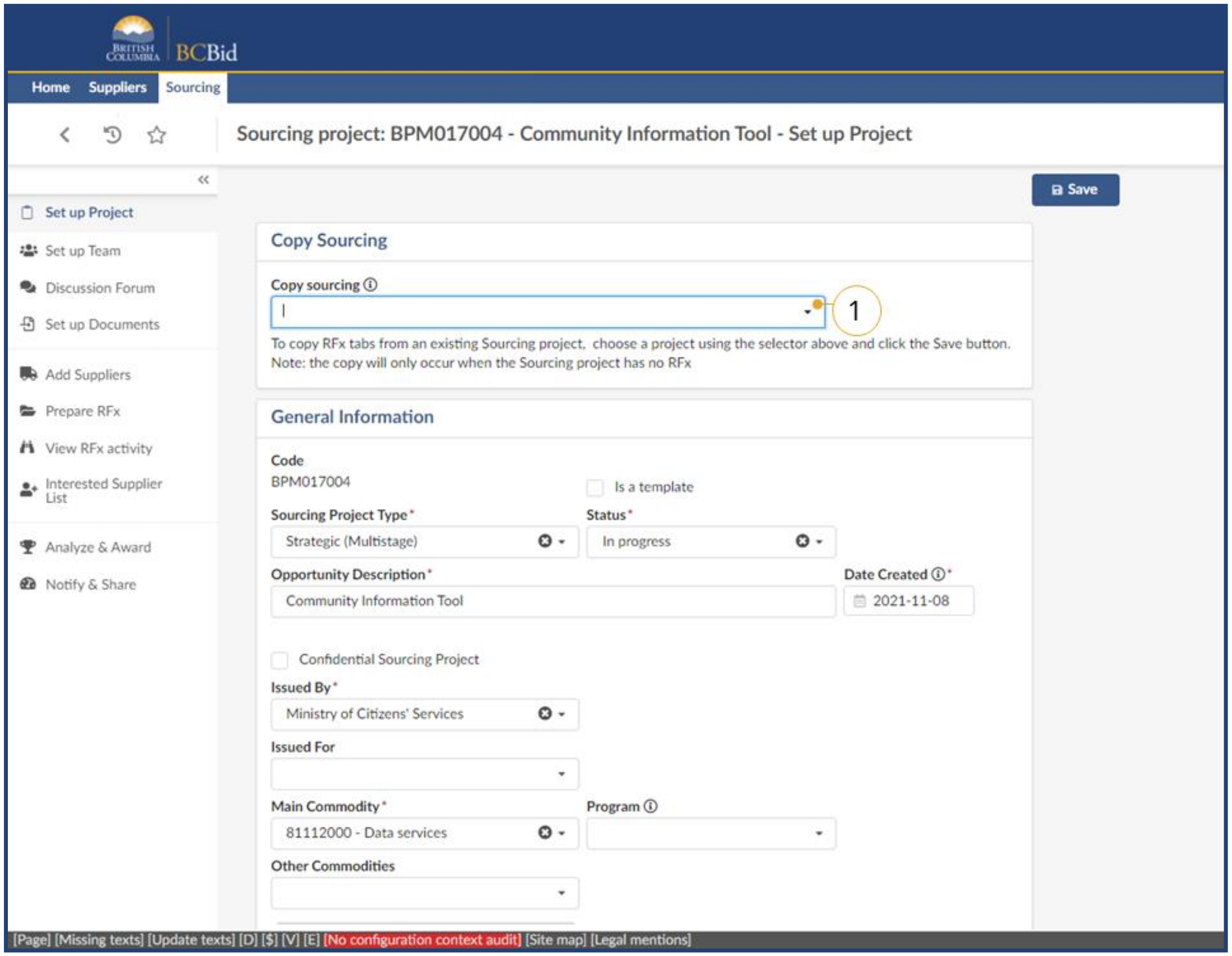
Set up Project



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



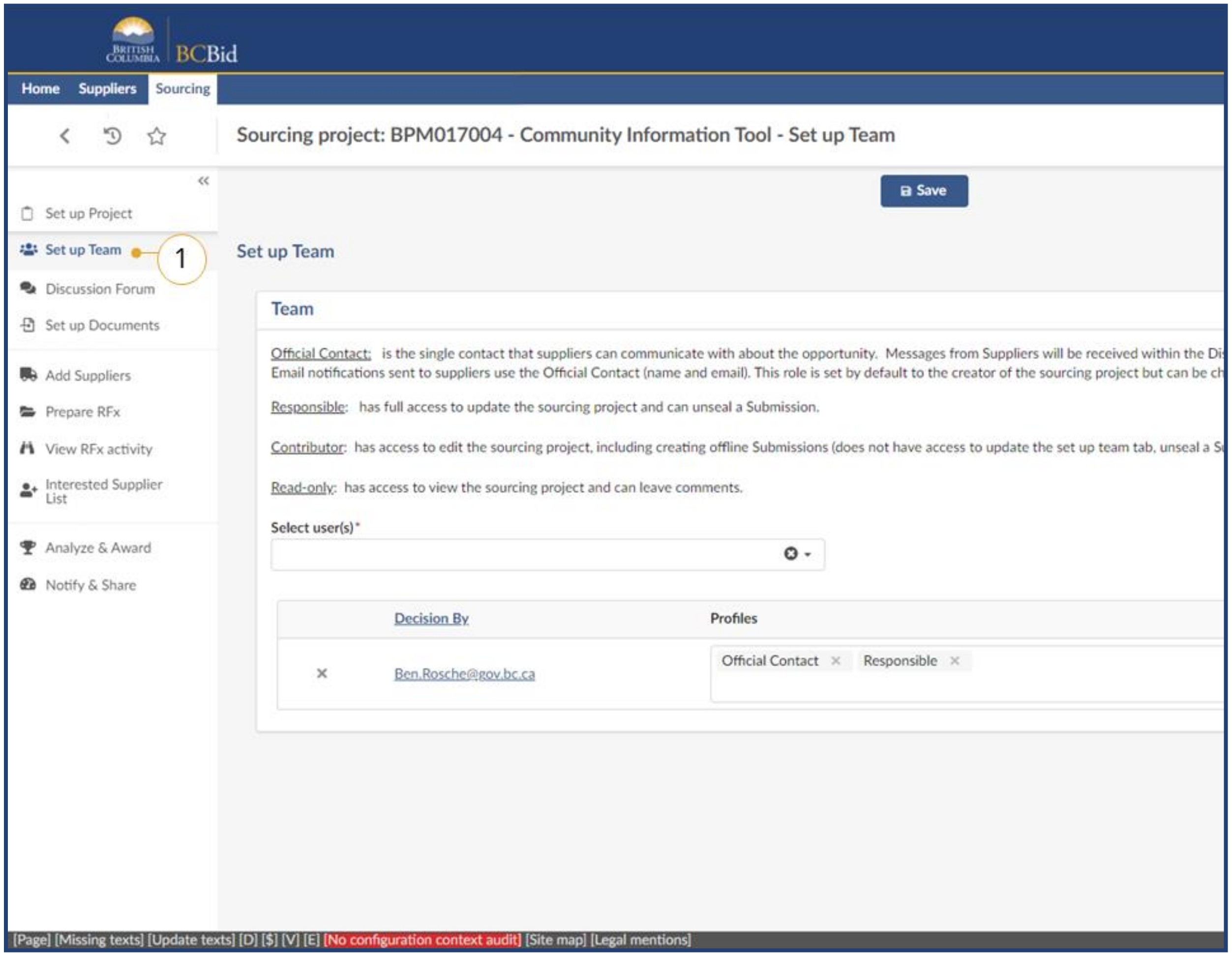
1. In the **Set up Project** tab, select a previously created Opportunity from the **Copy sourcing** drop-down list.

   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

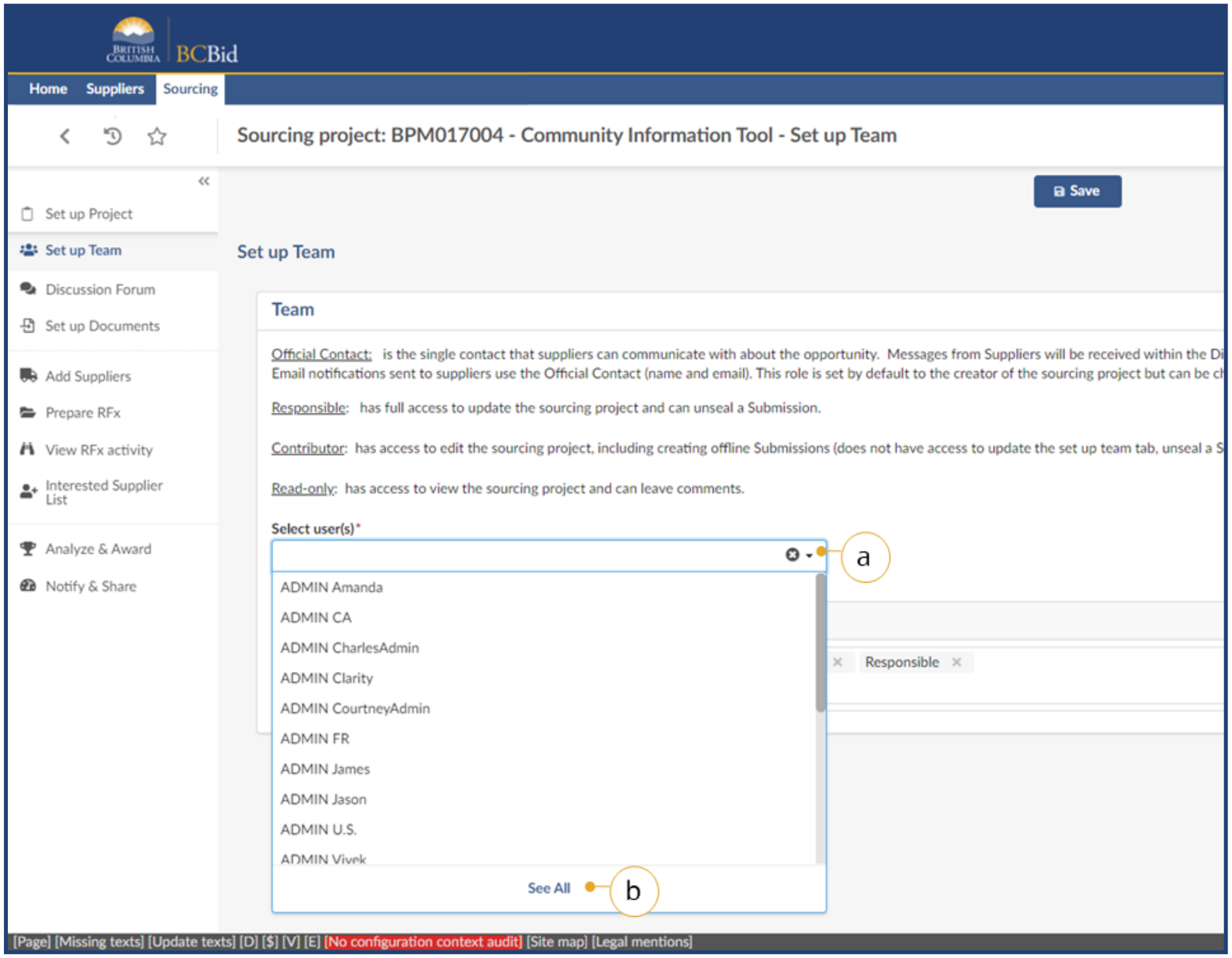


1. In the left-hand menu, click **Set Up Team** to add team members and assign roles for the project.

[Set up Team]

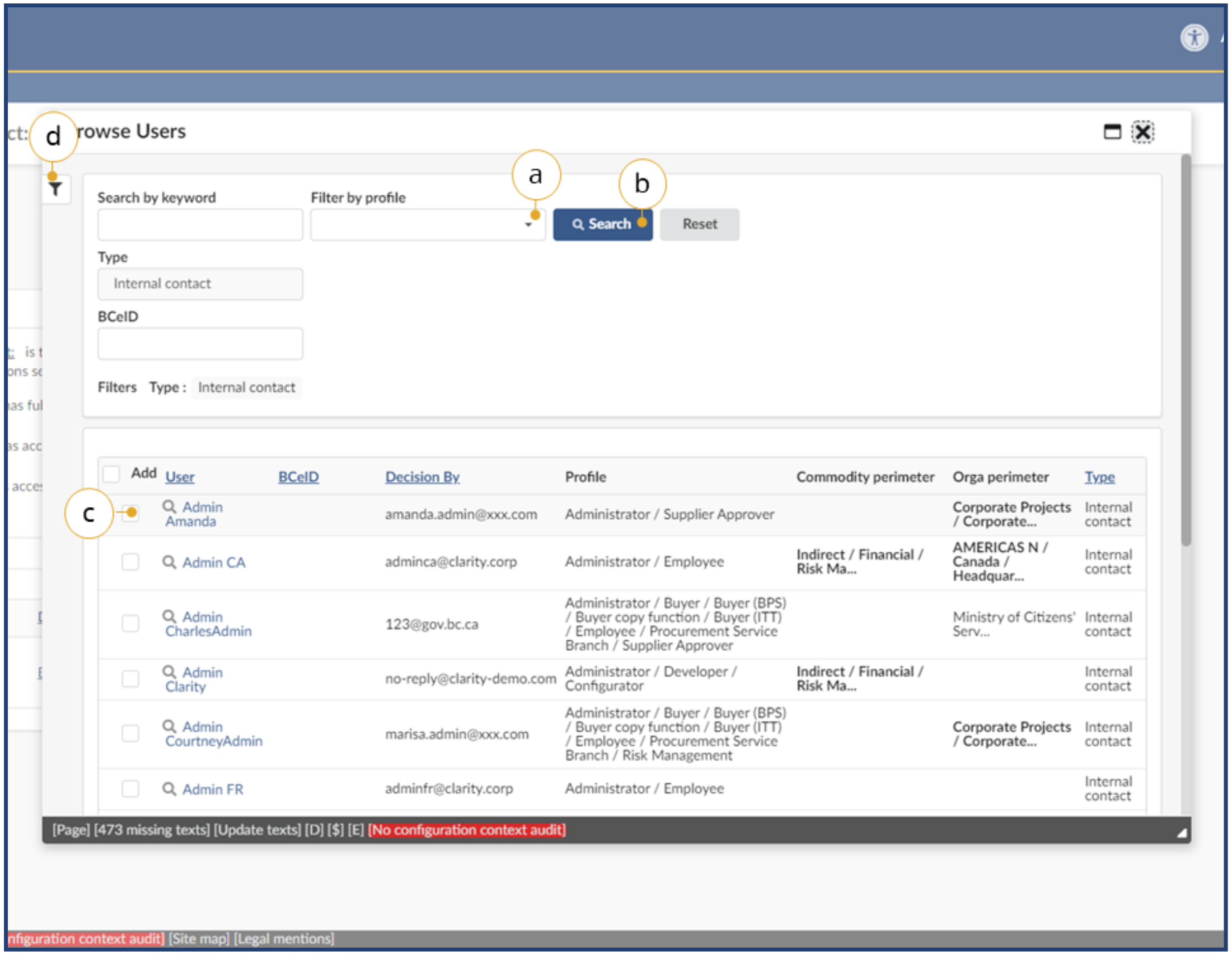
Assigning users to a team can only be done by the user with the Responsible role. The creator of the Sourcing Project is the Responsible by default. This can be changed.

Adding Users

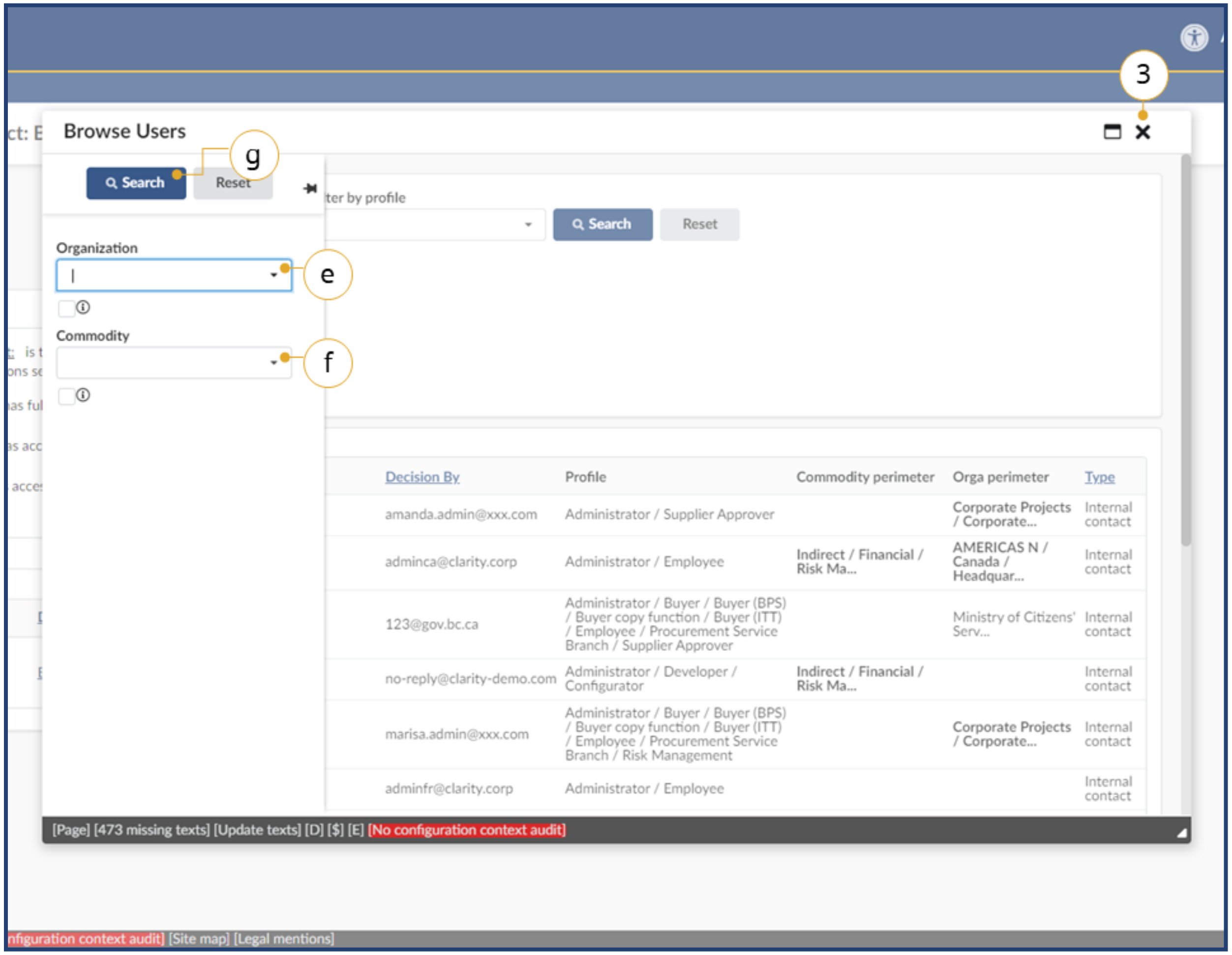


1. To add users to a sourcing team:
   a. In the **Select user(s)** drop-down list, enter the username and select the user to add to the team.
   b. In the **Select user(s)** drop-down list, click **See all** to search using Browse Users.

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.



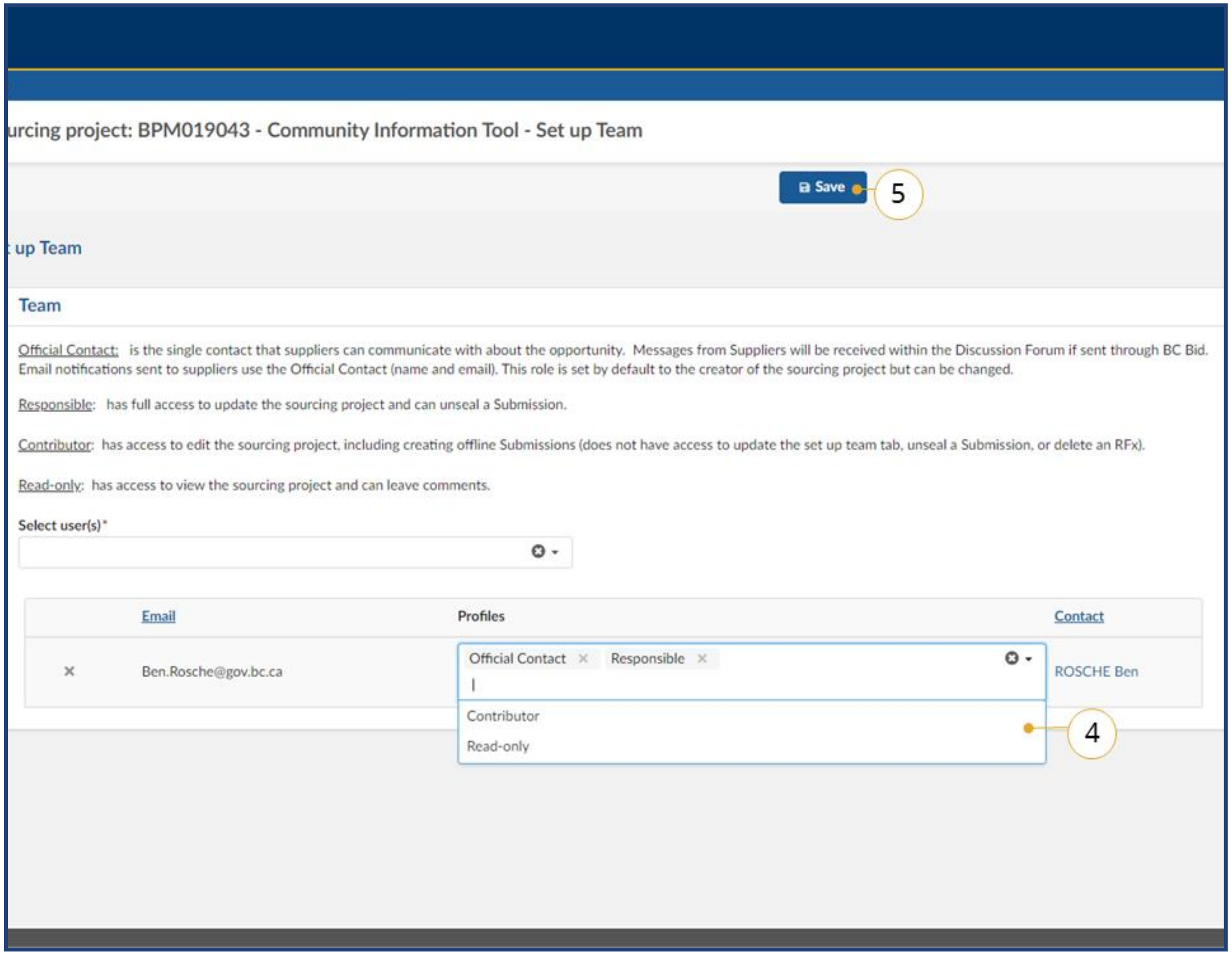
2. In the Browse Users window use **Search by keyword** to find a user.
   a. Select a profile type in the **Filter by profile** to narrow the search.
   b. Click **Search**.
   c. Select the **checkbox** in the **Add** column, for the required Users.
   d. *Optional:* Click the **pin** button to open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



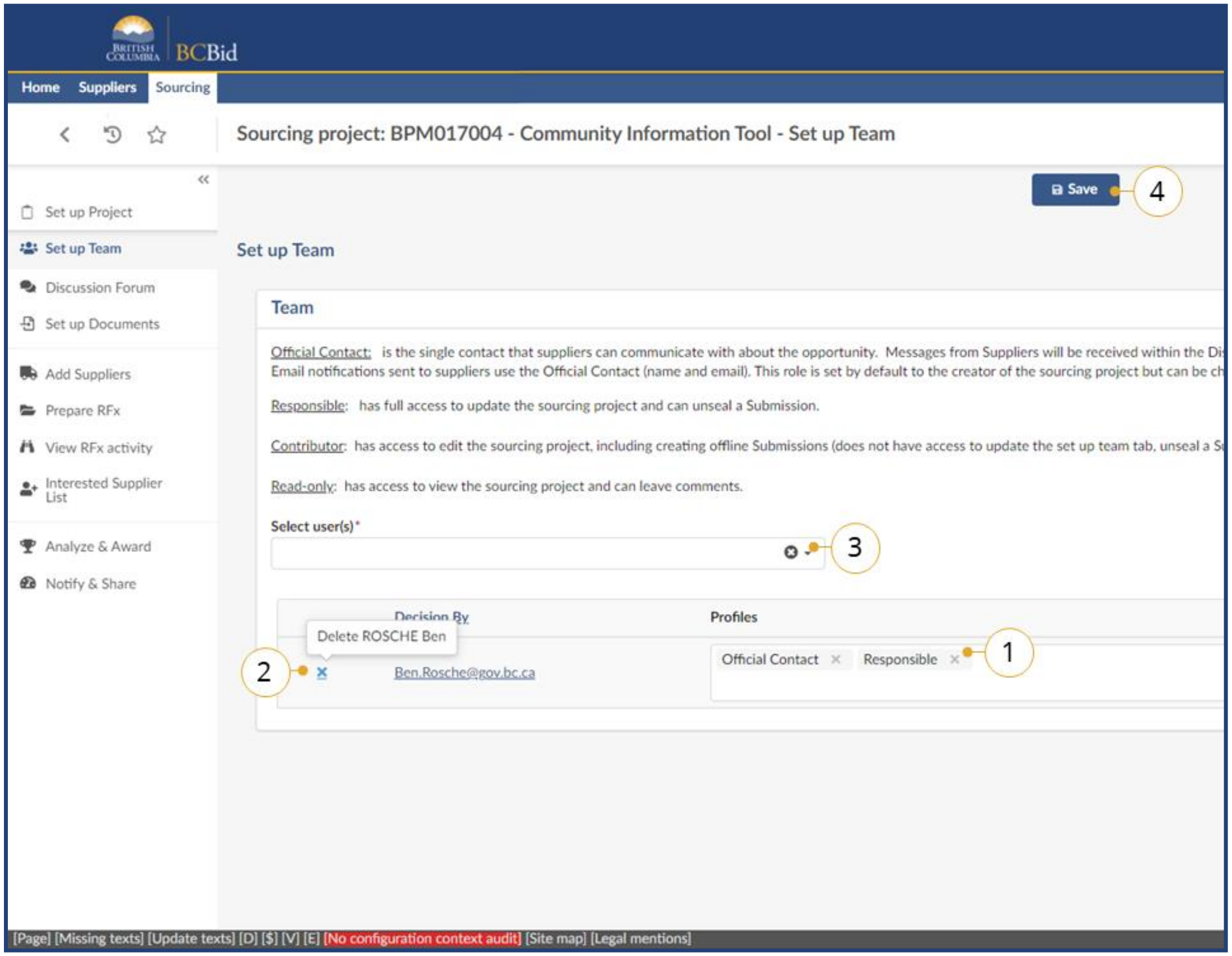
4. Use the **Profiles** drop-down list to select a profile for the added user.
5. Click **Save**.

   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

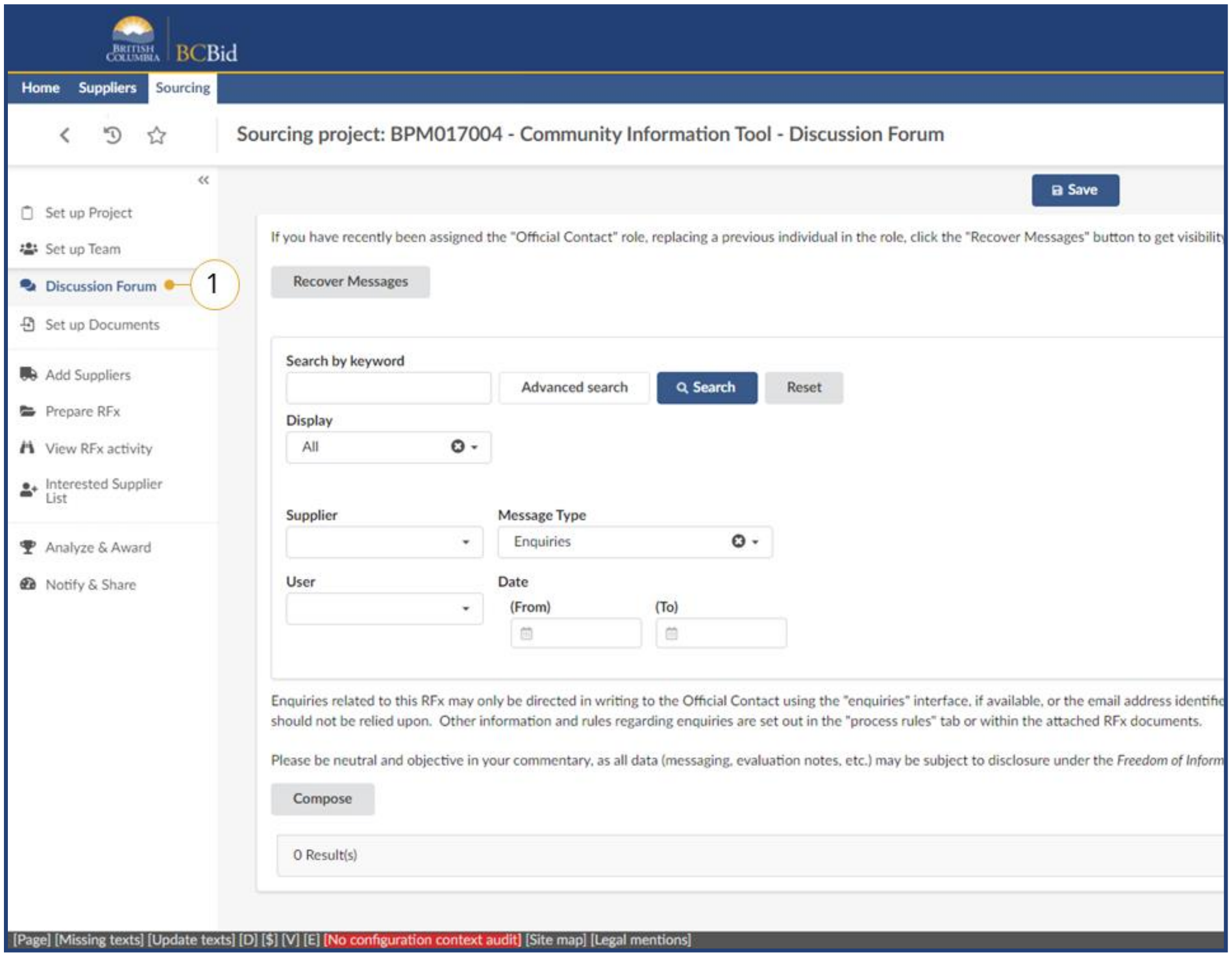


1. Click the **X** beside a profile to remove that profile for that specific user.
2. Click the **X** beside a Contact email to remove that user from the team.
3. Click the **X** in the **Select user(s)** dropdown to remove the entire team.
4. Click **Save**.

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.

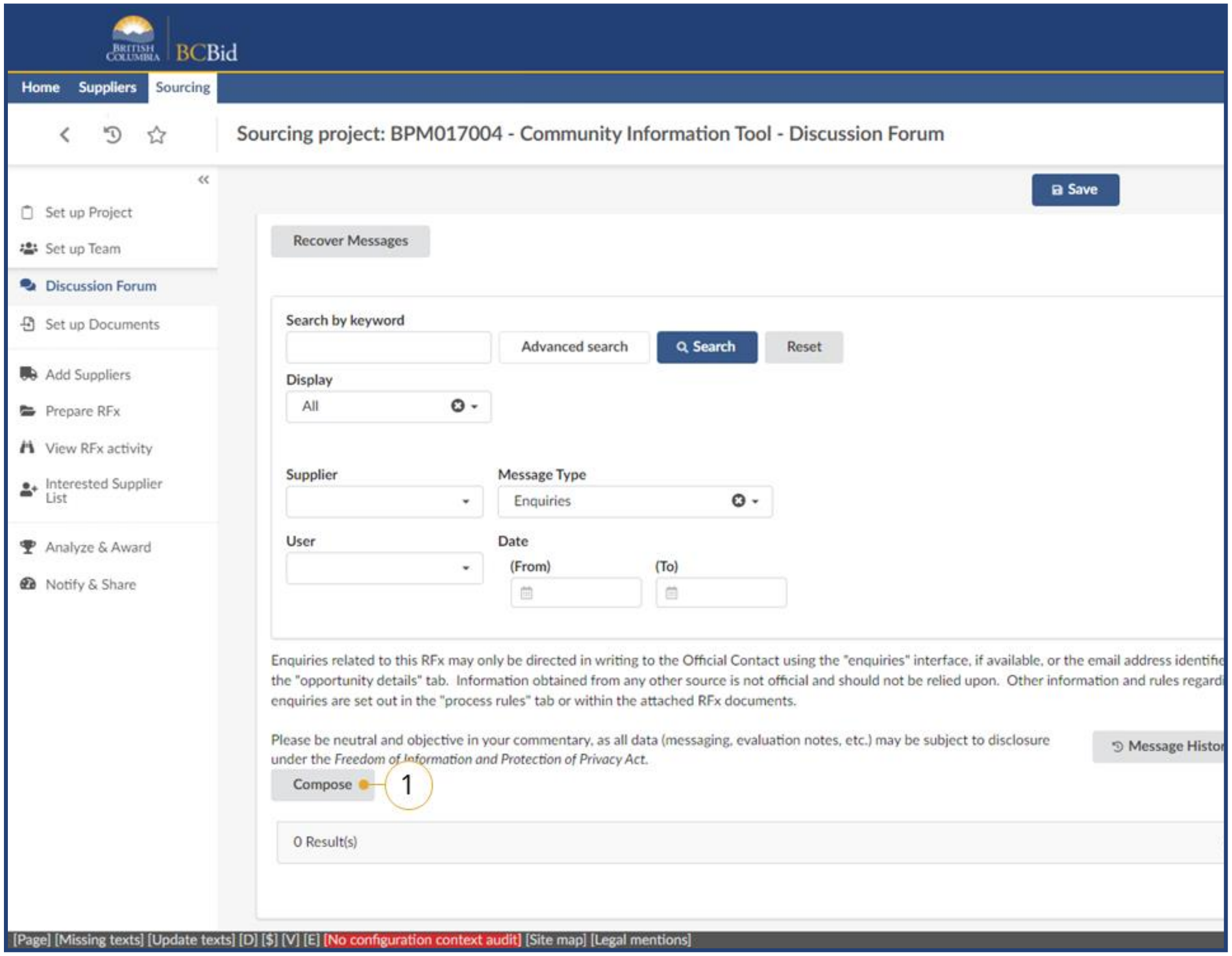


1. *Optional*: In the left-hand menu, click **Discussion Forum**.

[How to use Discussion Forum](#)

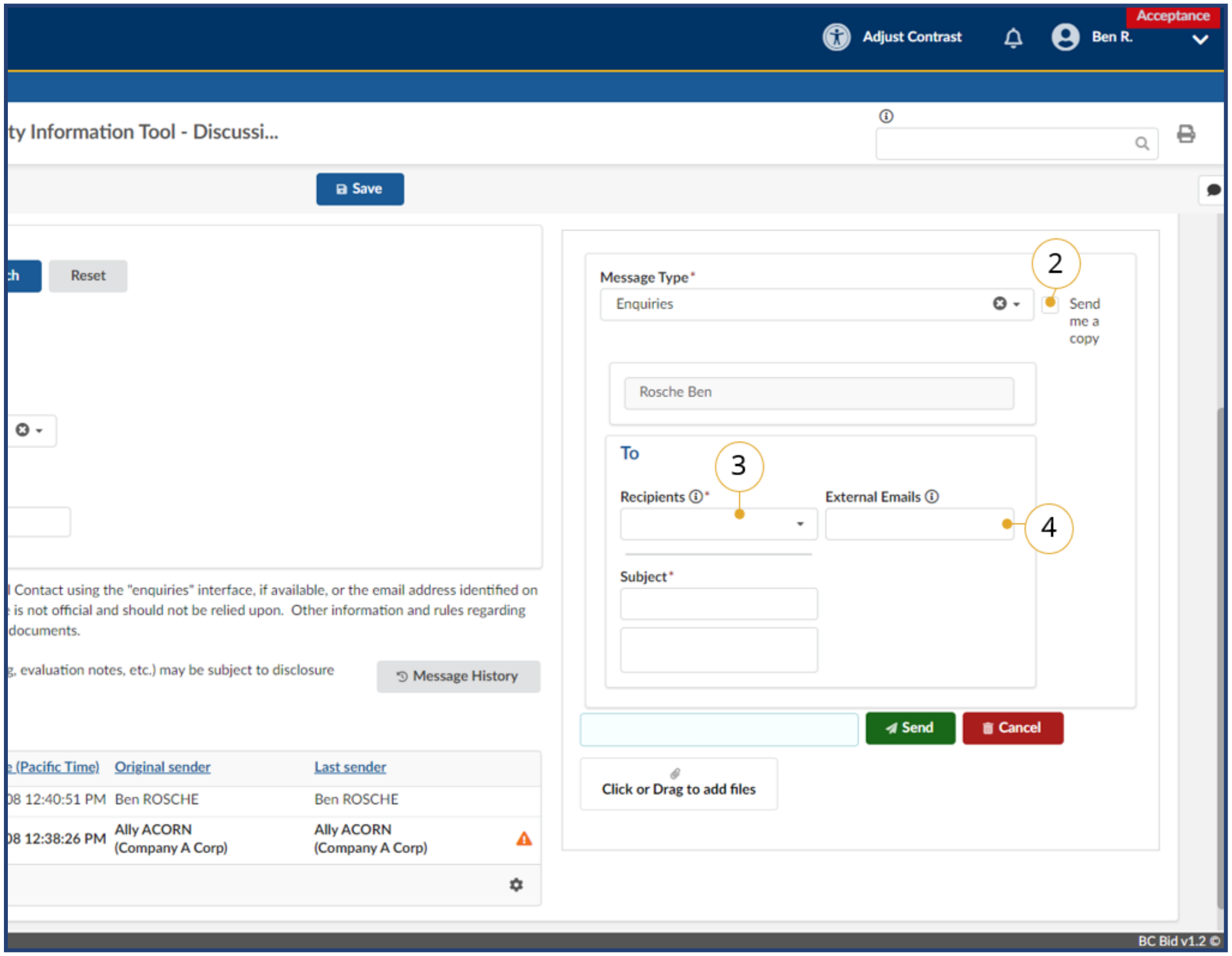
Note: There is no ability to reply directly to other users communications. This is an intentional design to mitigate the risk of sending out potentially sensitive information to all interested suppliers. Best practice is to reformulate the questions and send it out as a separate addenda.

Creating a New Message



1. Click **Compose**.

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

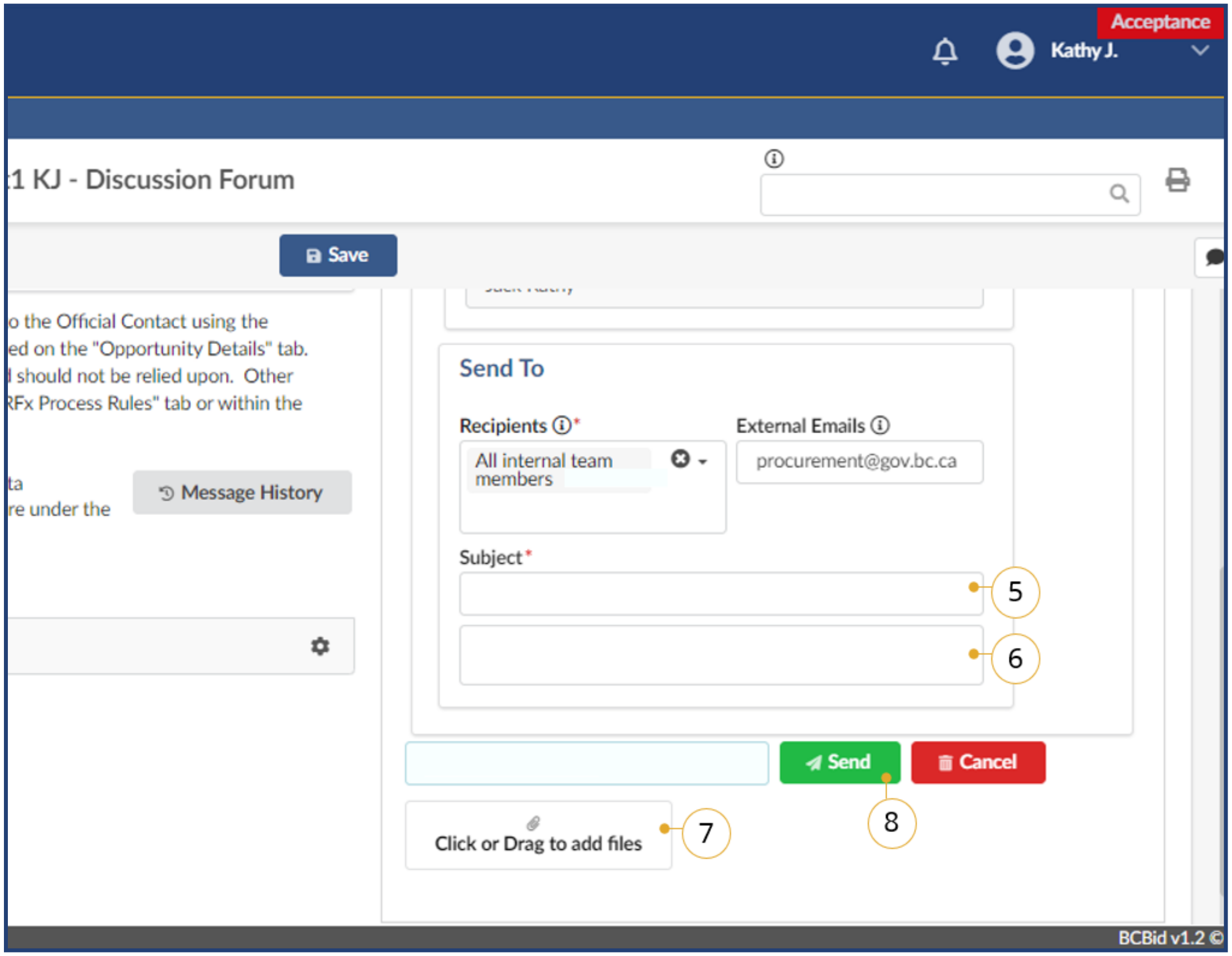


2. *Optional*: Select the **Send me a copy** checkbox to receive a copy of the email.
3. In the **To** section, select the recipients using the **Recipients** drop-down list.

   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.

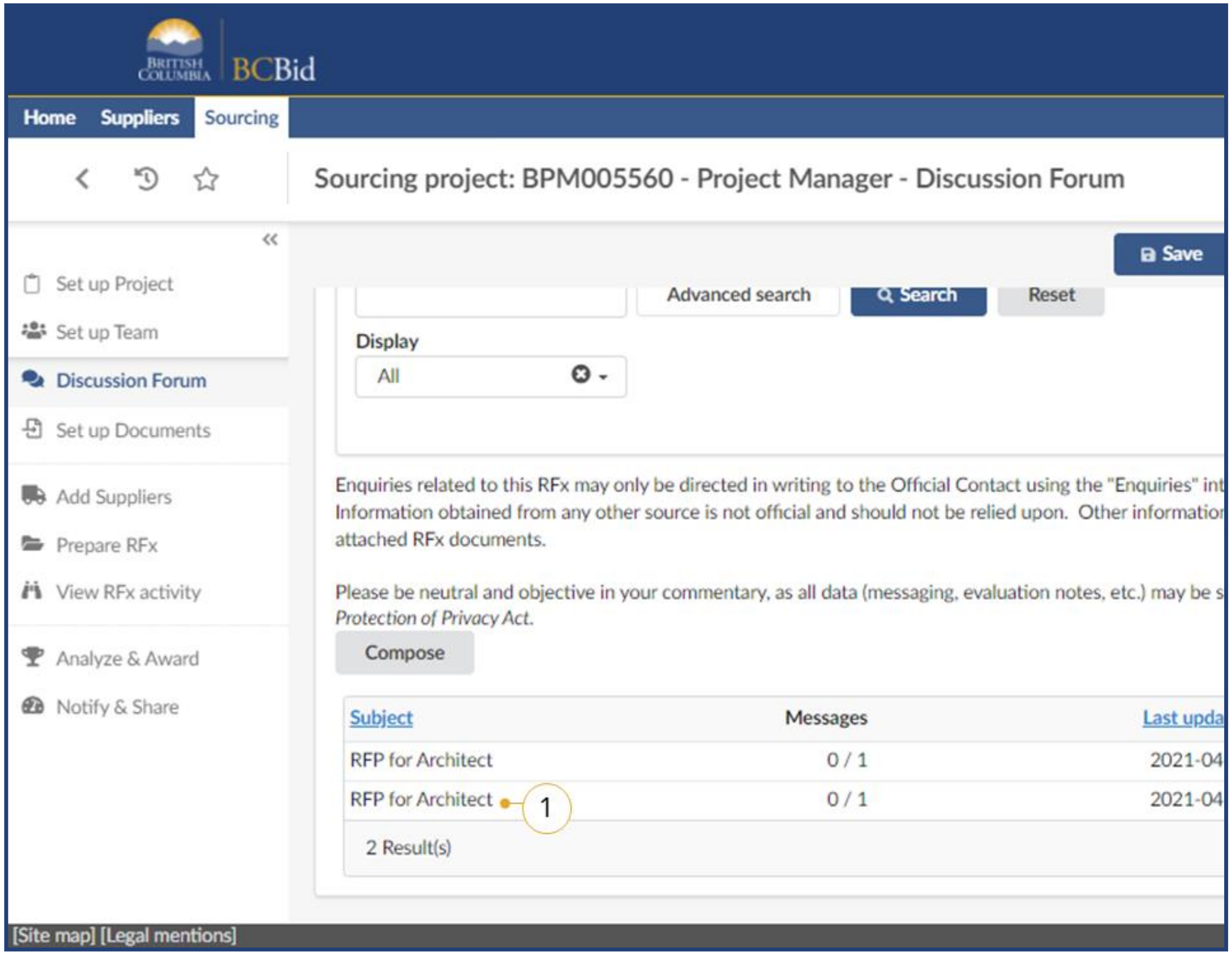
Messages emailed by the application (Discussion Form) do not contain attachments. Suppliers (and Buyer team members) need to sign into the application to retrieve attachments. It is recommended that if the buyer attaches files to a message that they make a note in the message text that attachments are 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**.

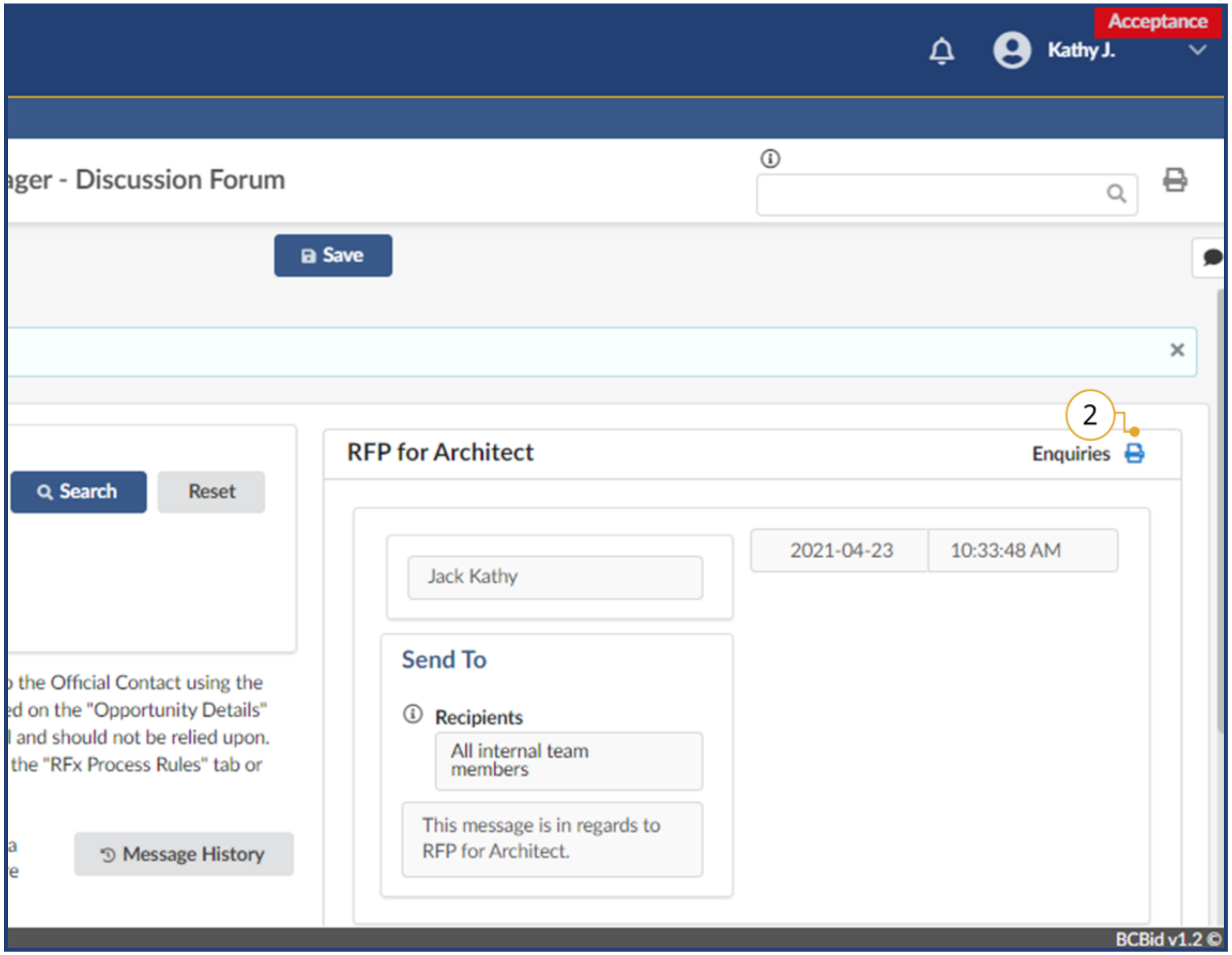
You cannot delete a message once it has been sent.

Print a Communication

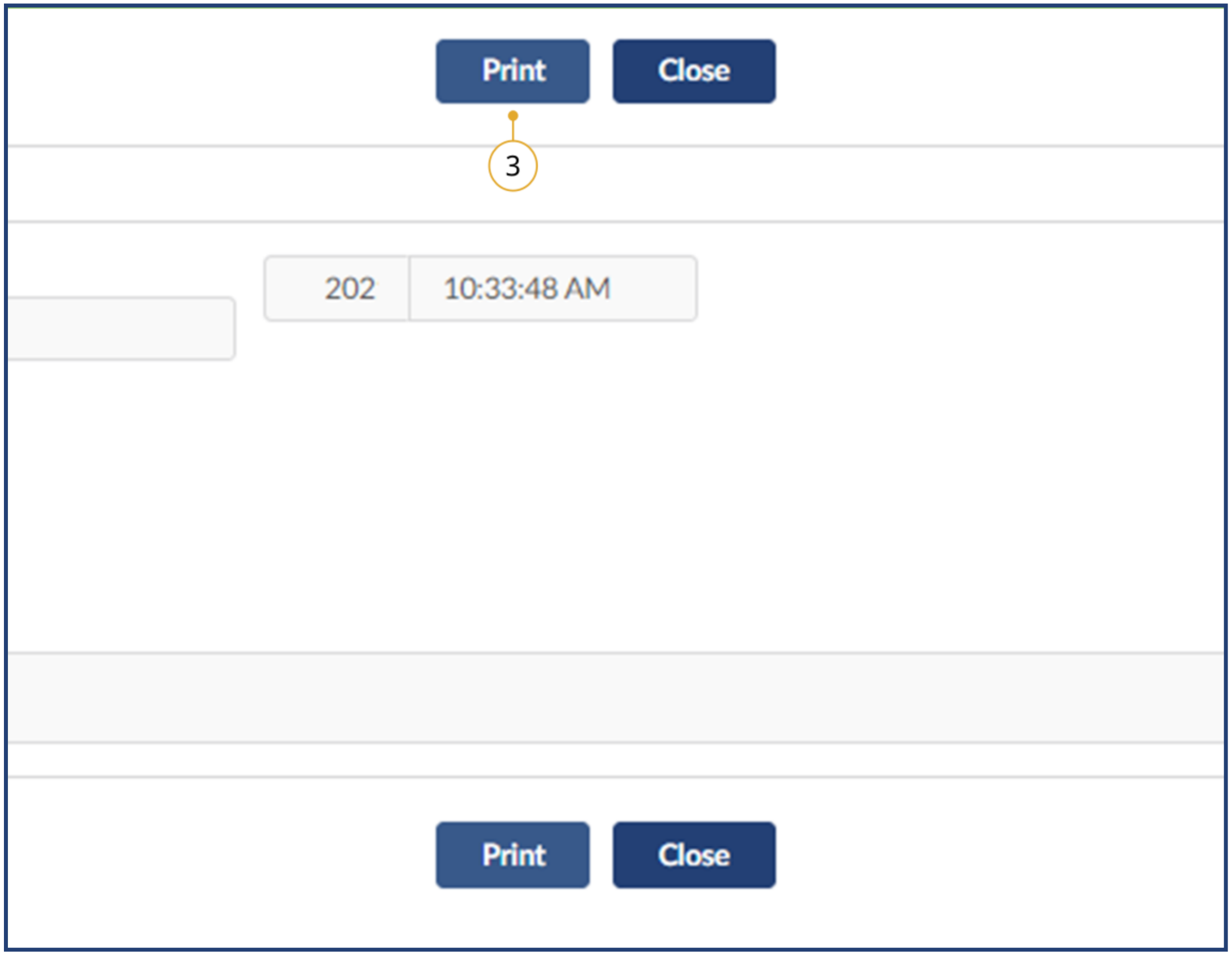


1. Select the communication you would like to print.

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.

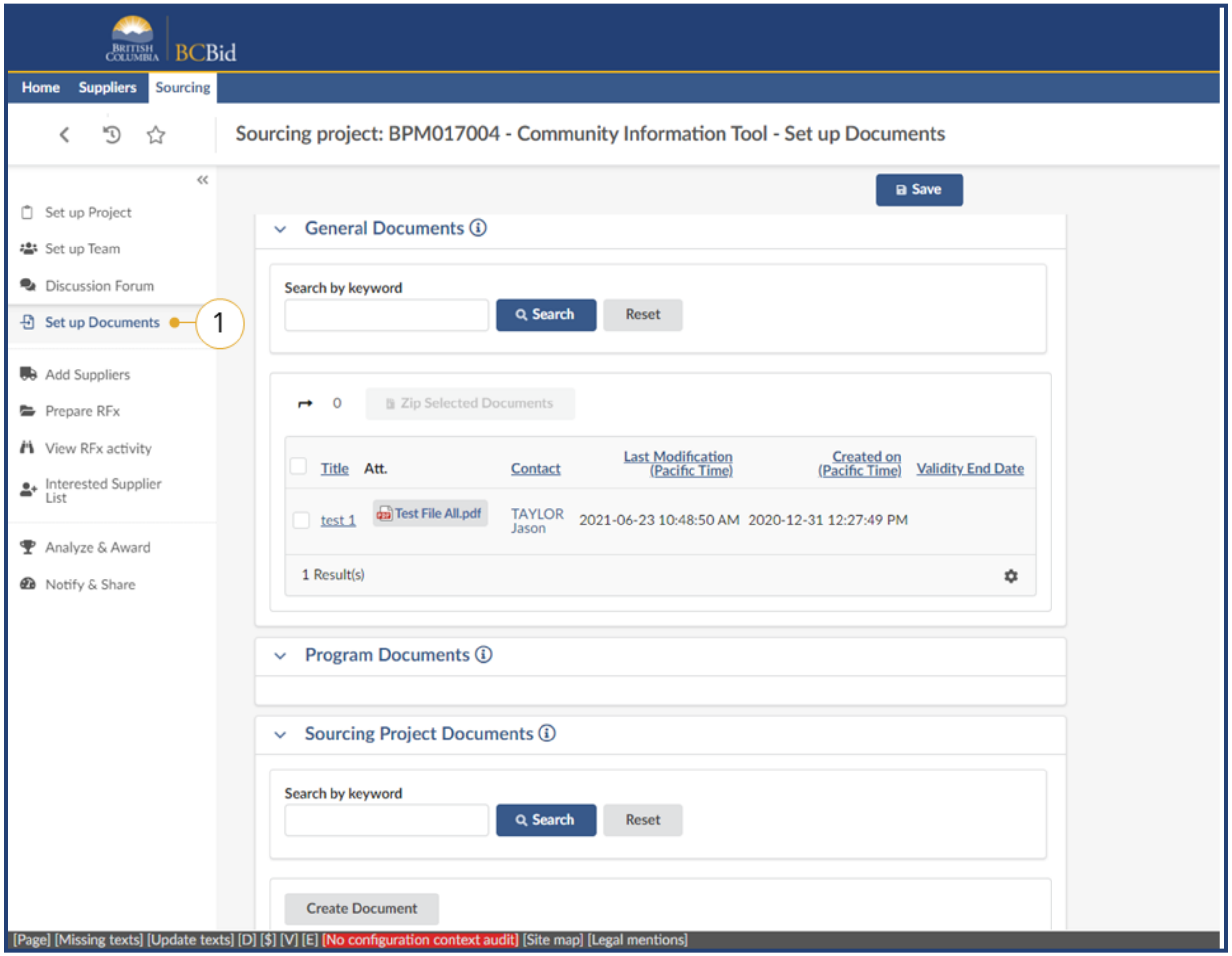


2. Click the **Print** (printer) icon.



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

Set up Documents

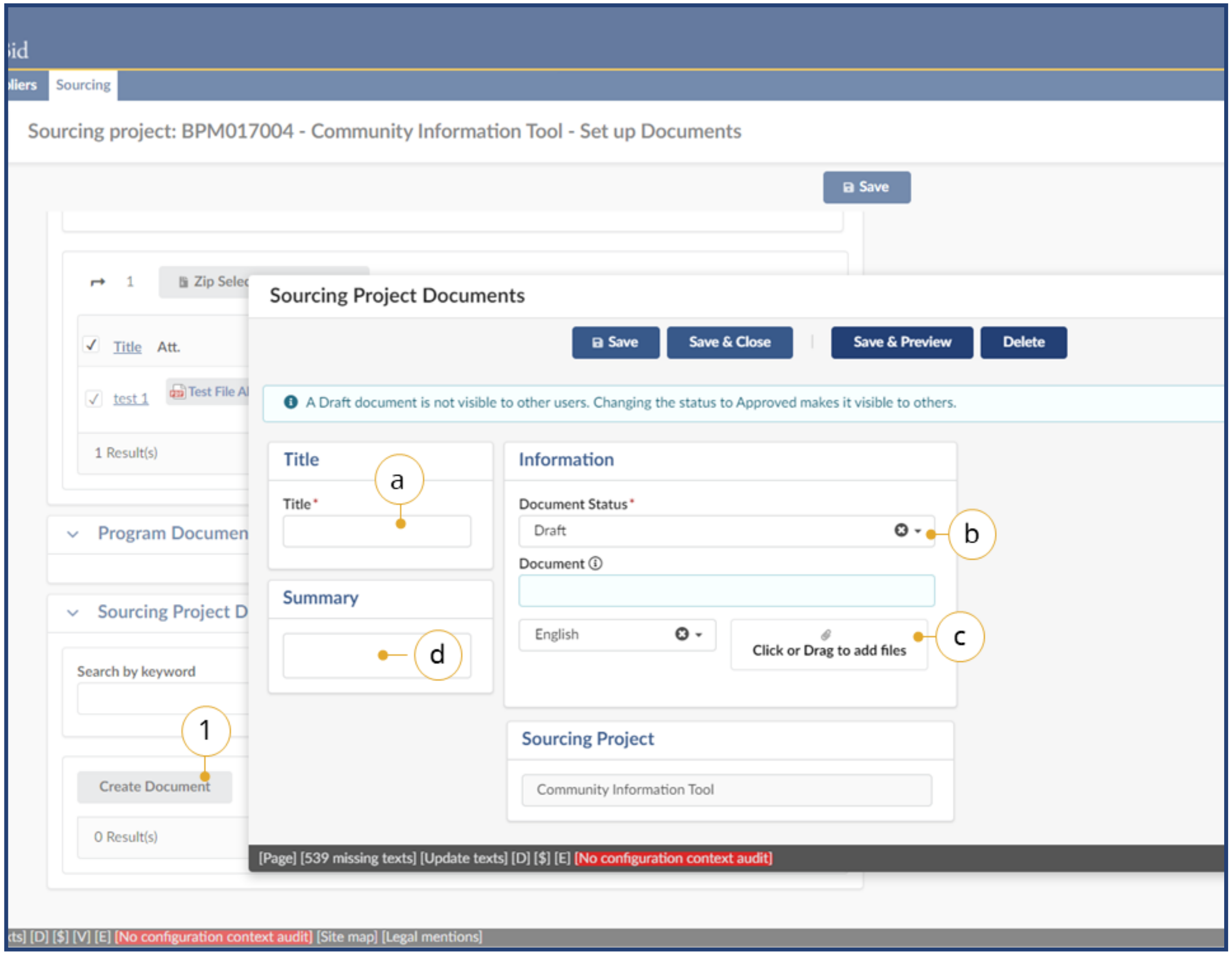


1. In the left-hand menu, click **Set Up Documents**.

[Set up Documents](#)

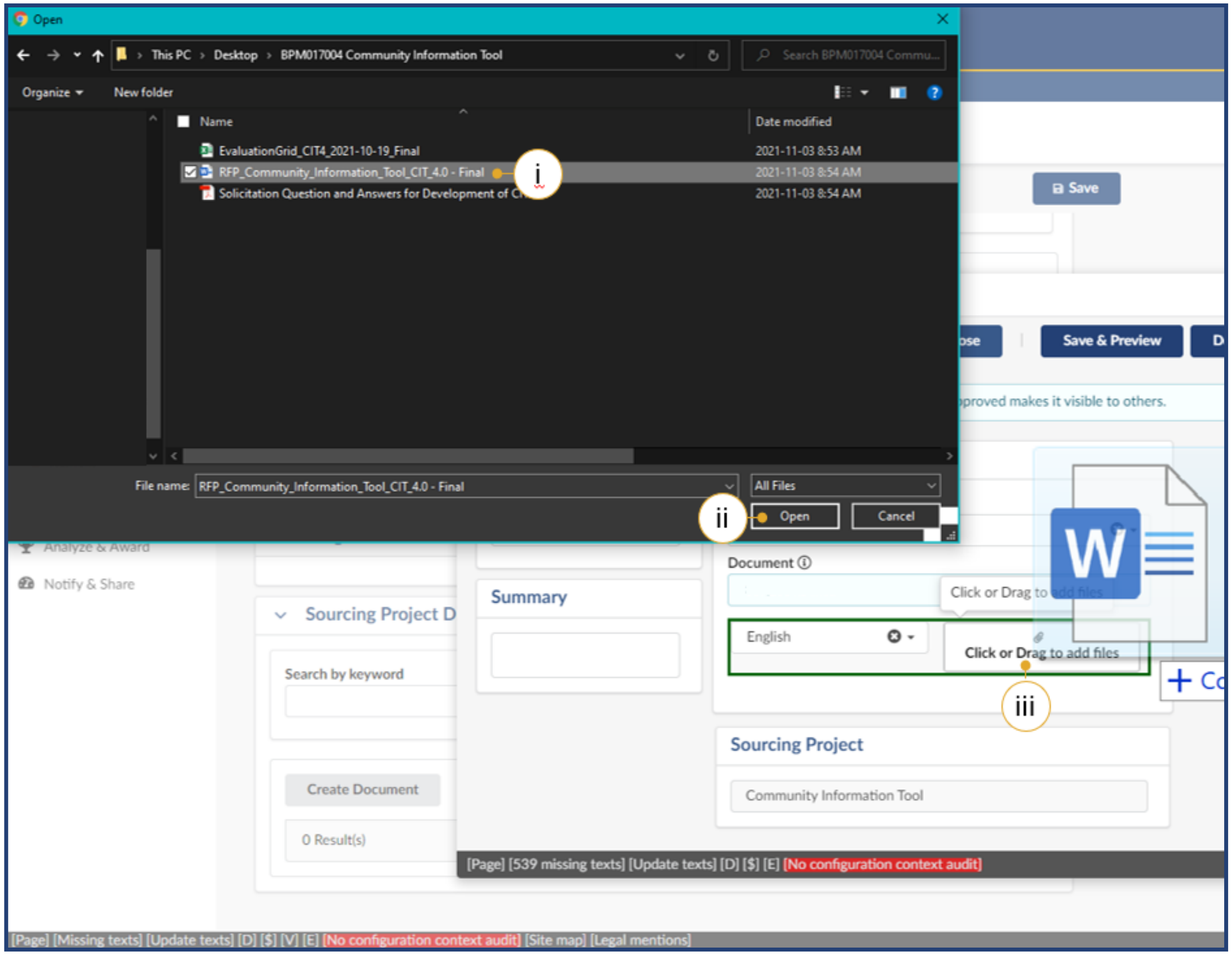
Provides an list of all the General Documents, Program Documents, and Sourcing Project Documents that are relevant to the project. Buyers can use this screen to upload Sourcing Project Documents.

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**.

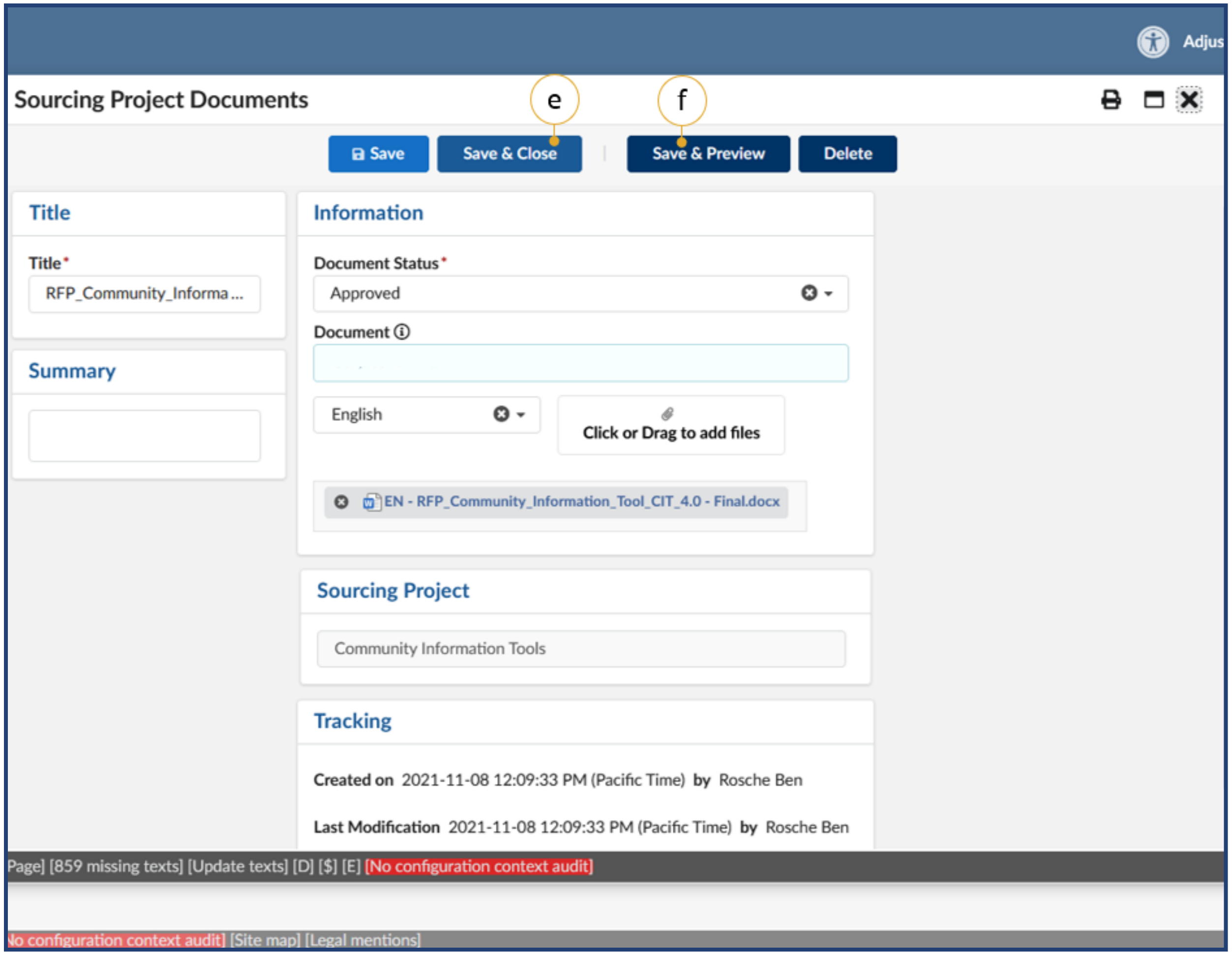
Buyers must only upload 1 document per upload.



iv. Select the document to upload.

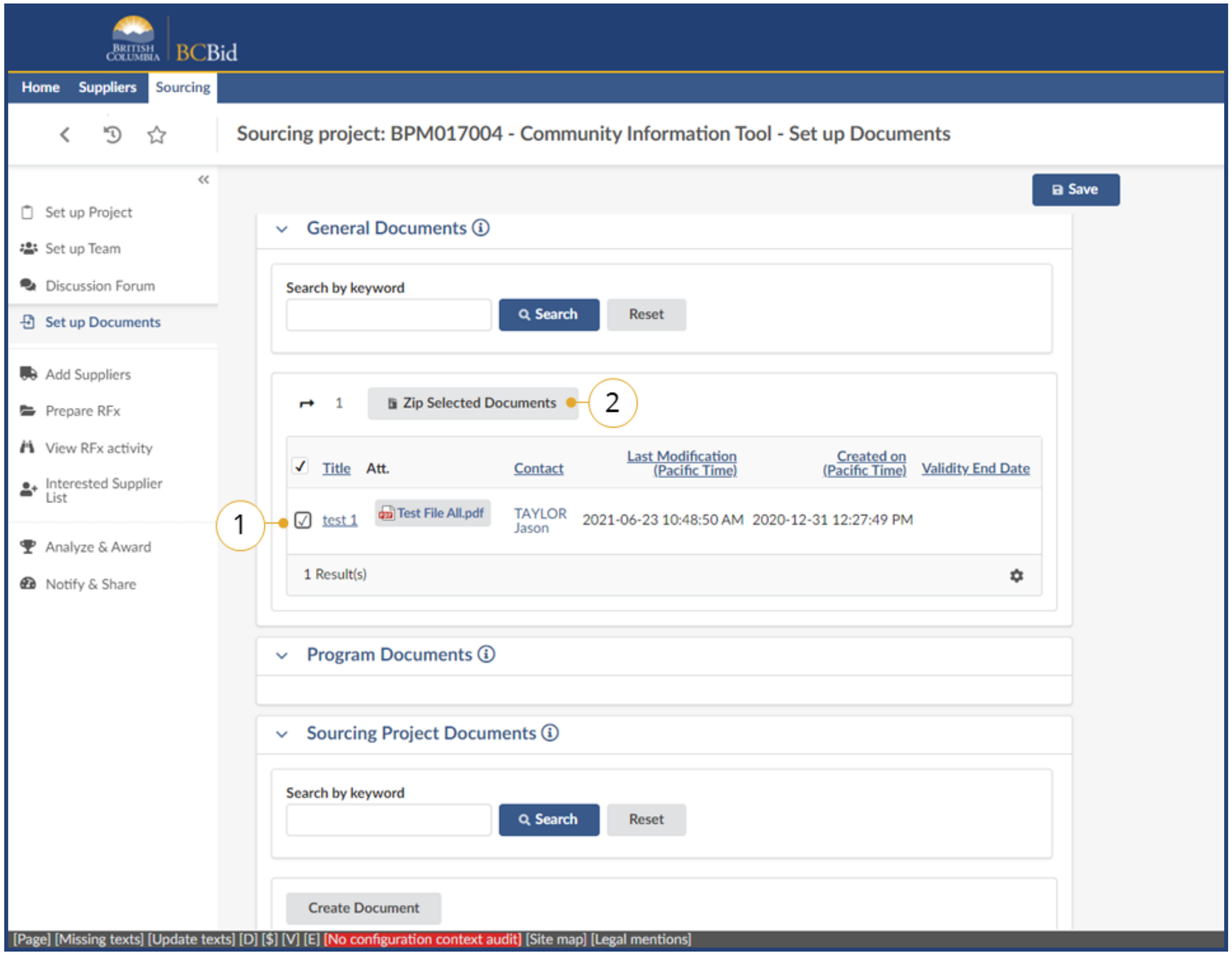
v. Click **Open.**

vi. Alternatively, open Windows Explorer and drag the file to the **Click or Drag to add files** button.



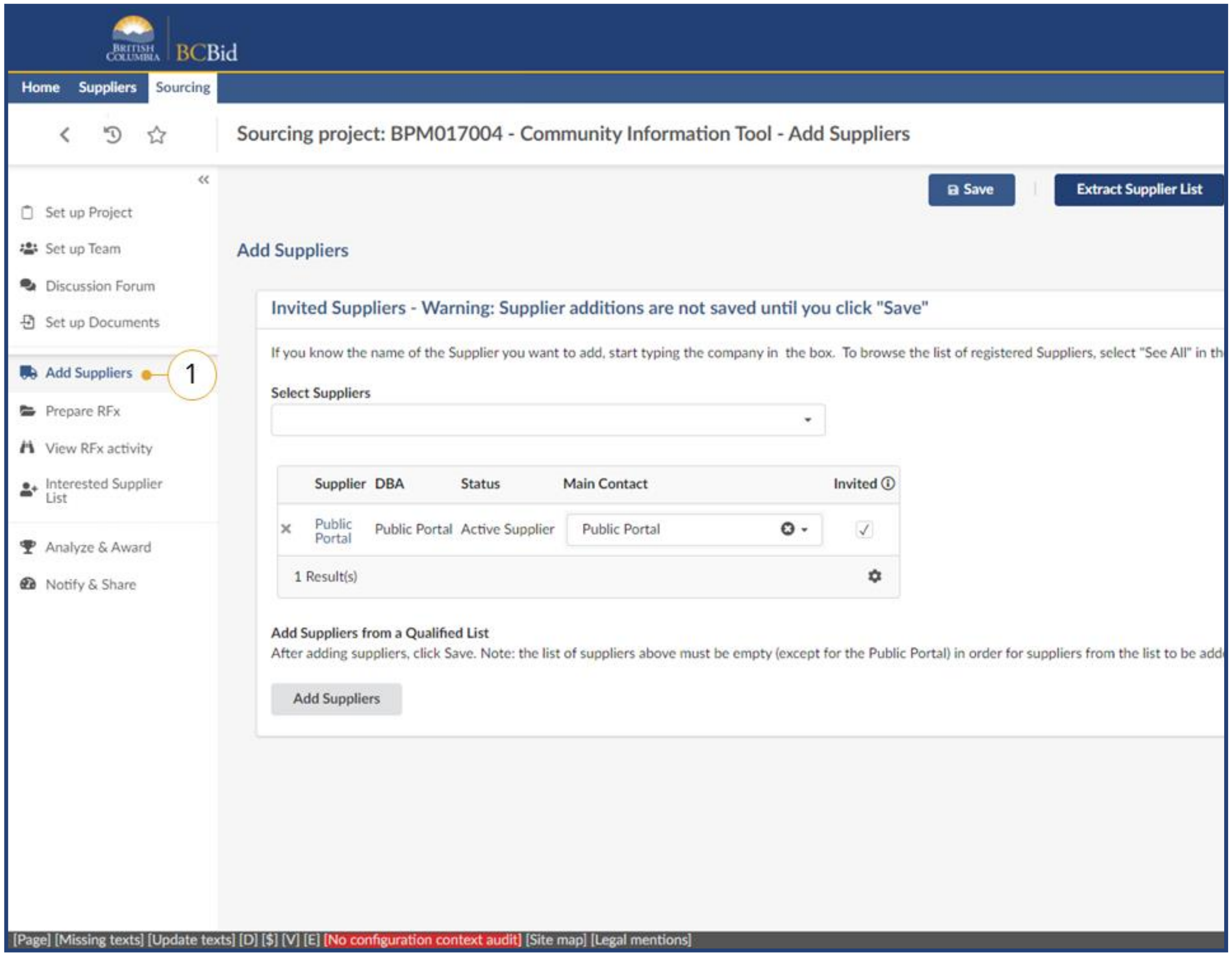
e. Click **Save & Preview** to preview the uploaded documents from a Supplier perspective.
f. Click **Save & Close** to upload.

Downloading Existing Documents



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

Add Suppliers

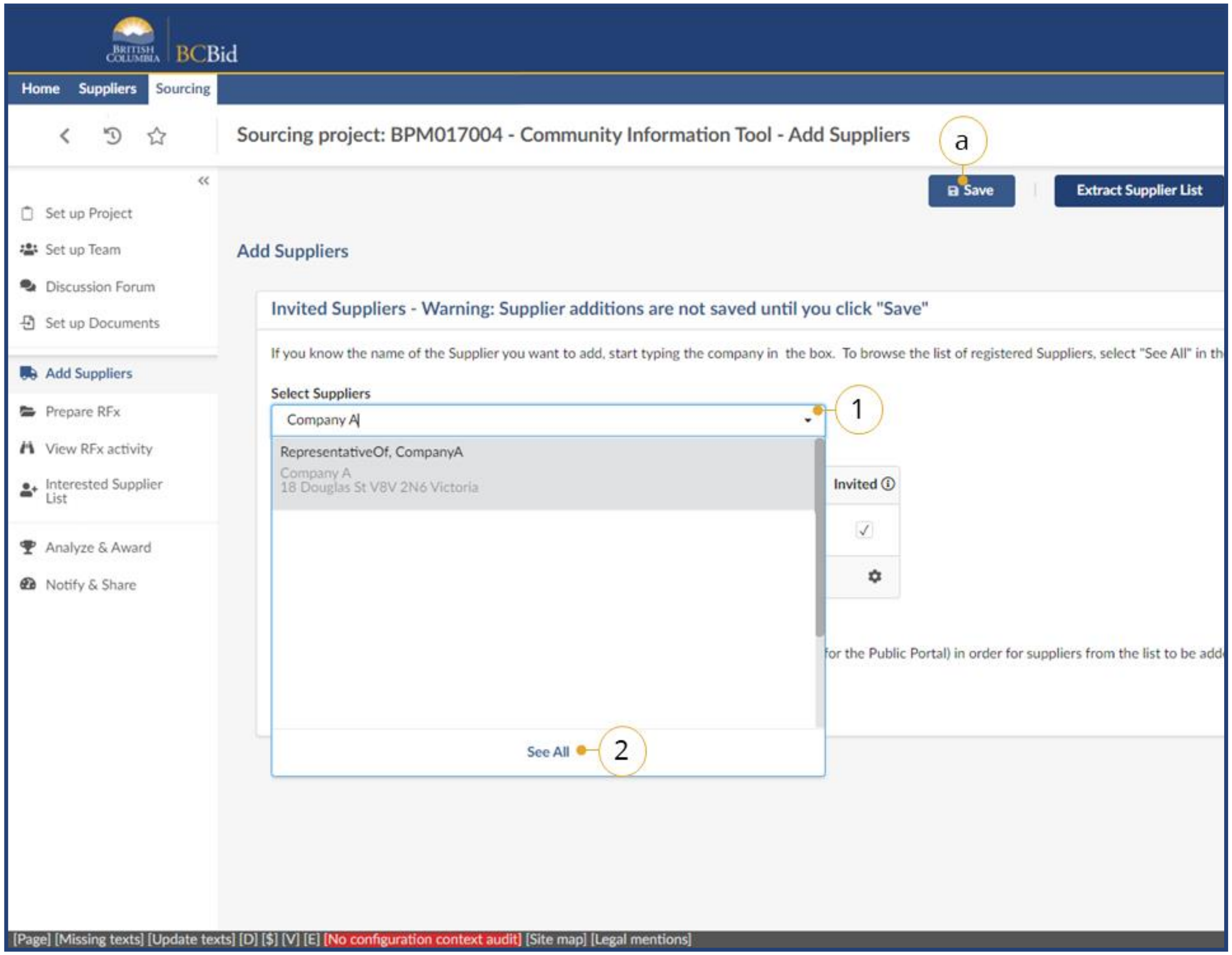


1. In the left-hand menu, click **Add Suppliers** to review the list of invited suppliers fom the Add Suppliers tab.

[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



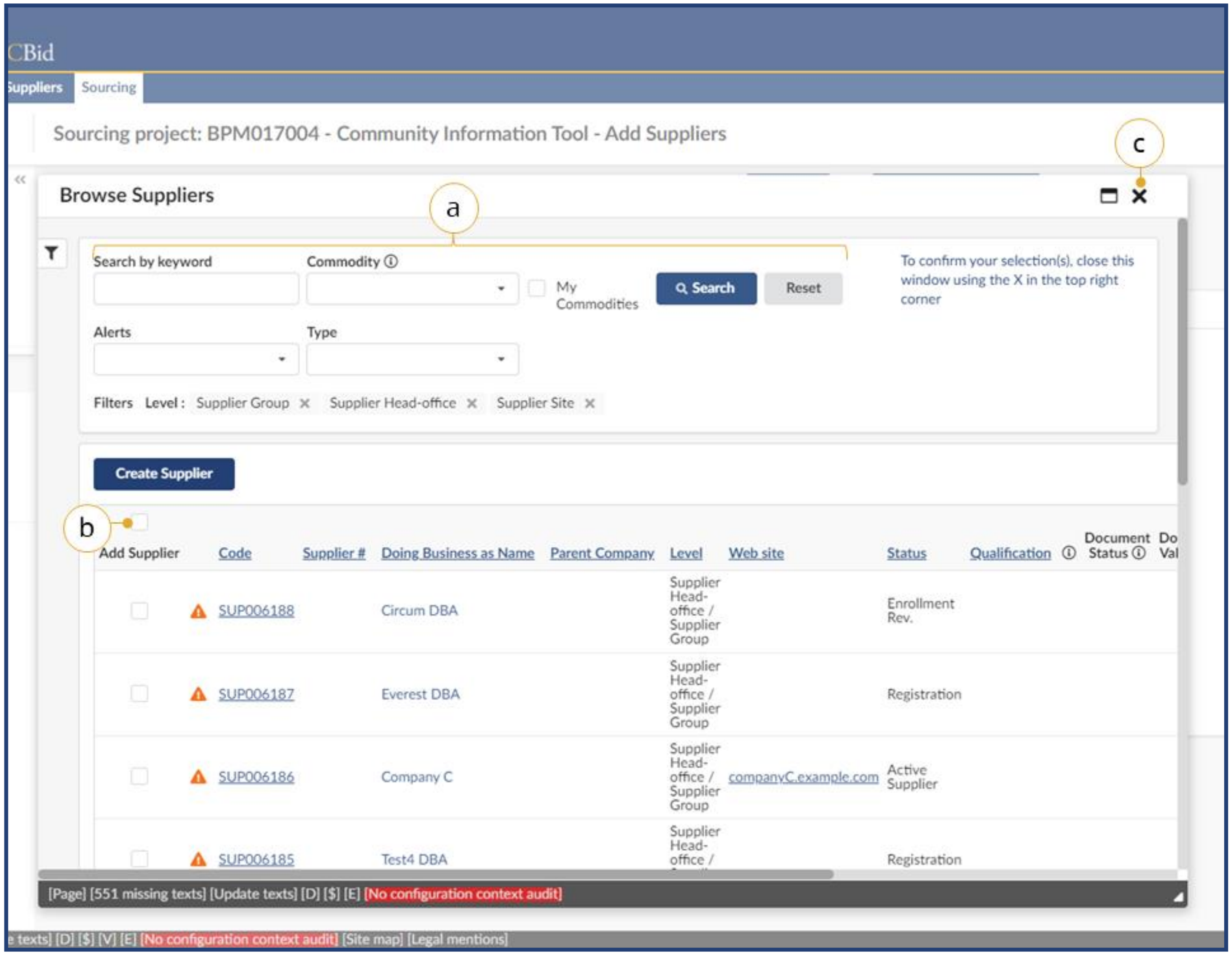
1. In the **Select Suppliers** drop-down list, start typing in the name of the Supplier to be added, then select it when it displays.
   a. Click **Save**.
2. If unable to find the Supplier, click **See All**.

[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.

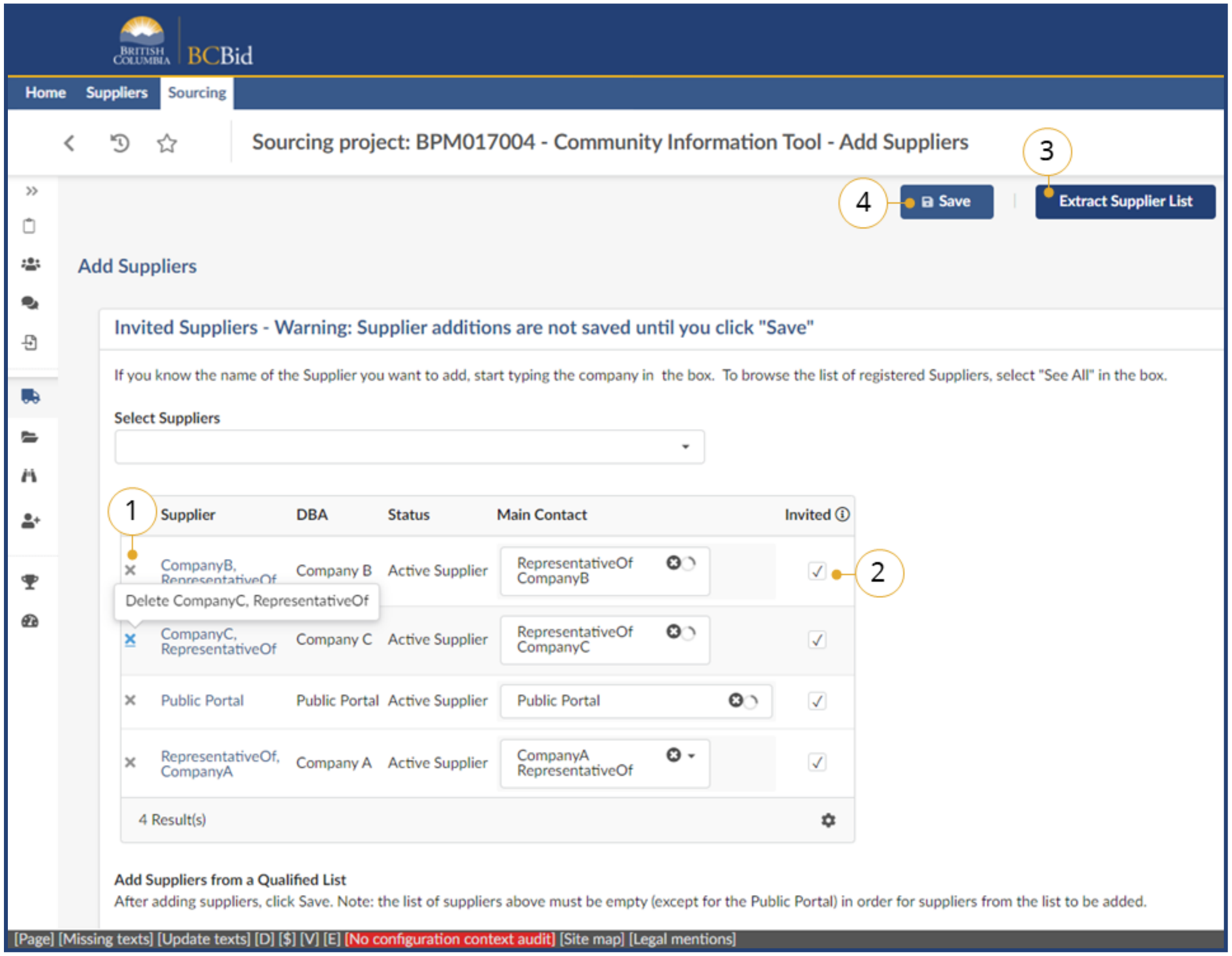
Once an opportunity is posted, Suppliers that are selected here will get a notification.

Browse Suppliers



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

Removing Suppliers and Extracting Supplier List



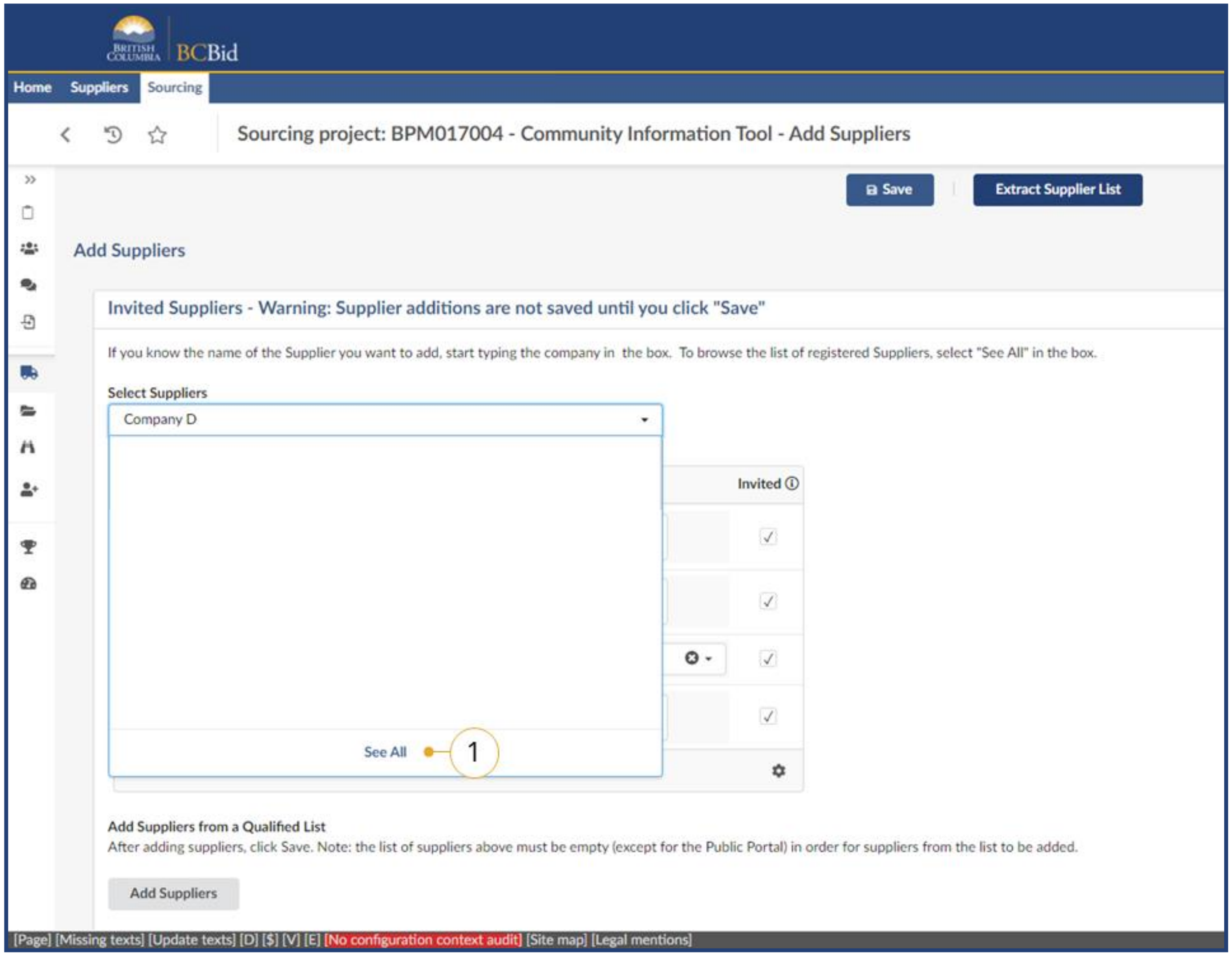
1. To remove a Supplier, select the **X** next to the Supplier name.
2. To remove a Supplier from the invitation list, select the **checkbox** in the Invited column.
3. Click **Extract Supplier List**.
4. Click **Save**

[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.

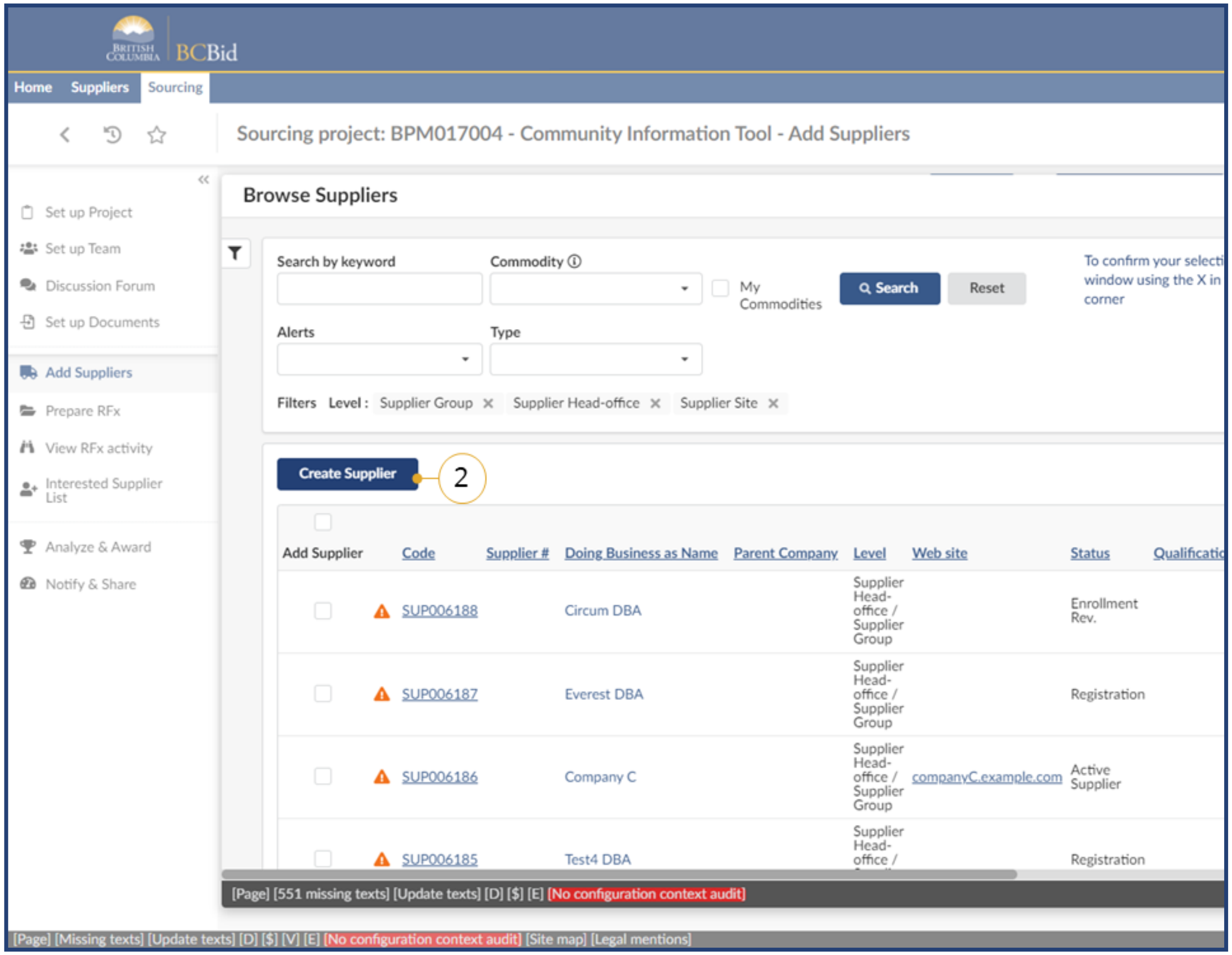
Creating a New Supplier

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.

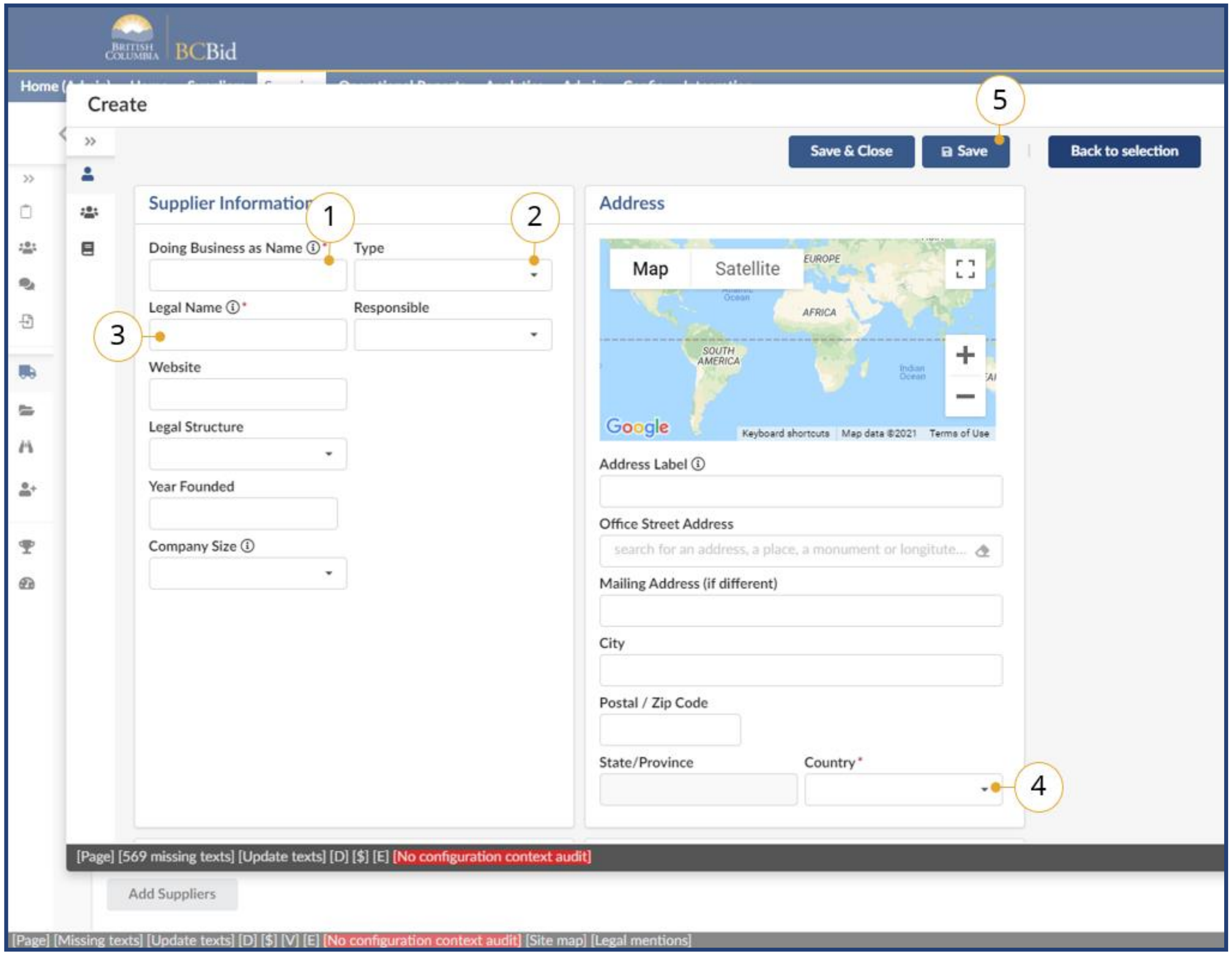


1. In the **Select Suppliers** drop-down list, select **See All**.

[Creating a new Supplier]

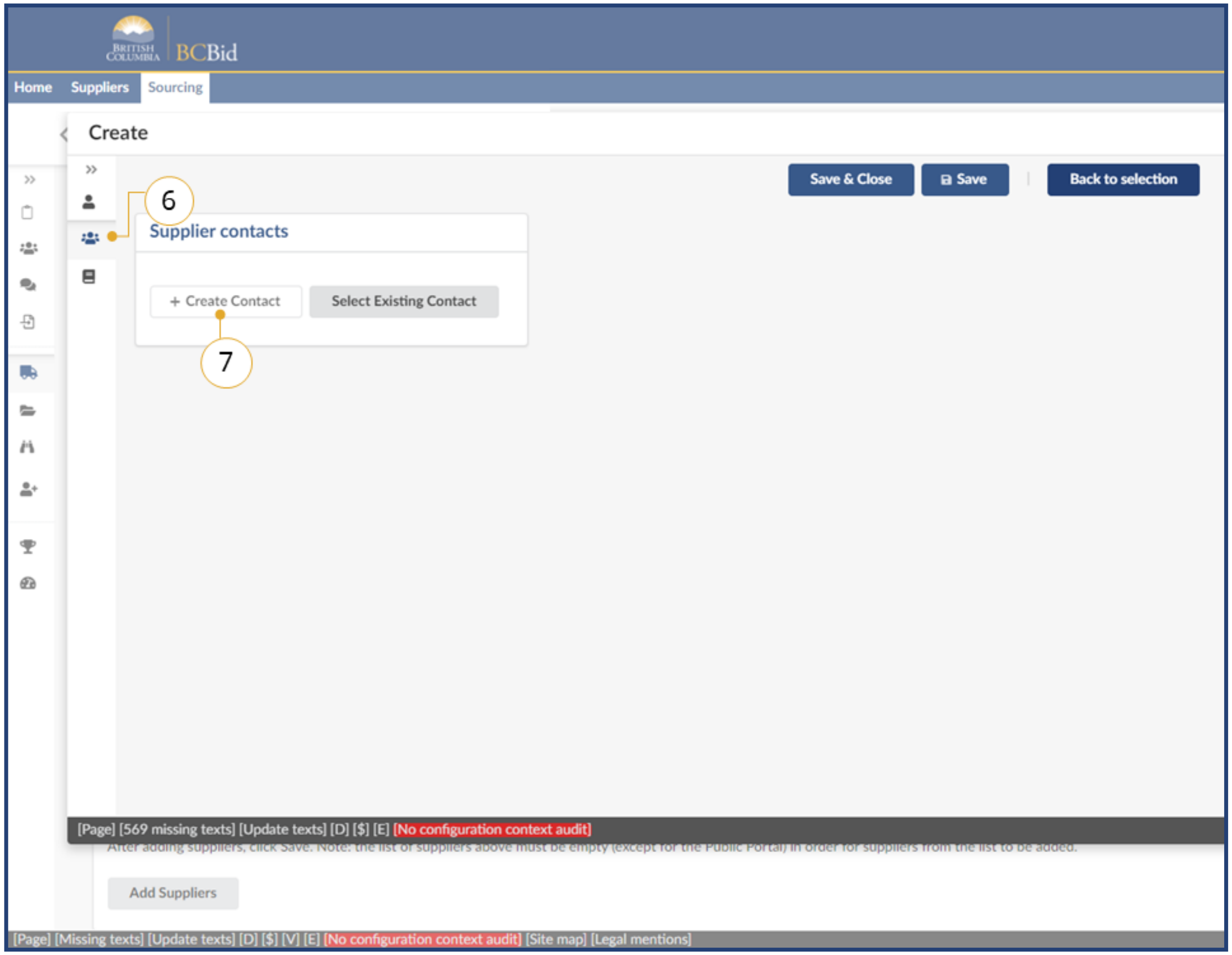


2. In the Browse Suppliers window, click **Create Supplier**.

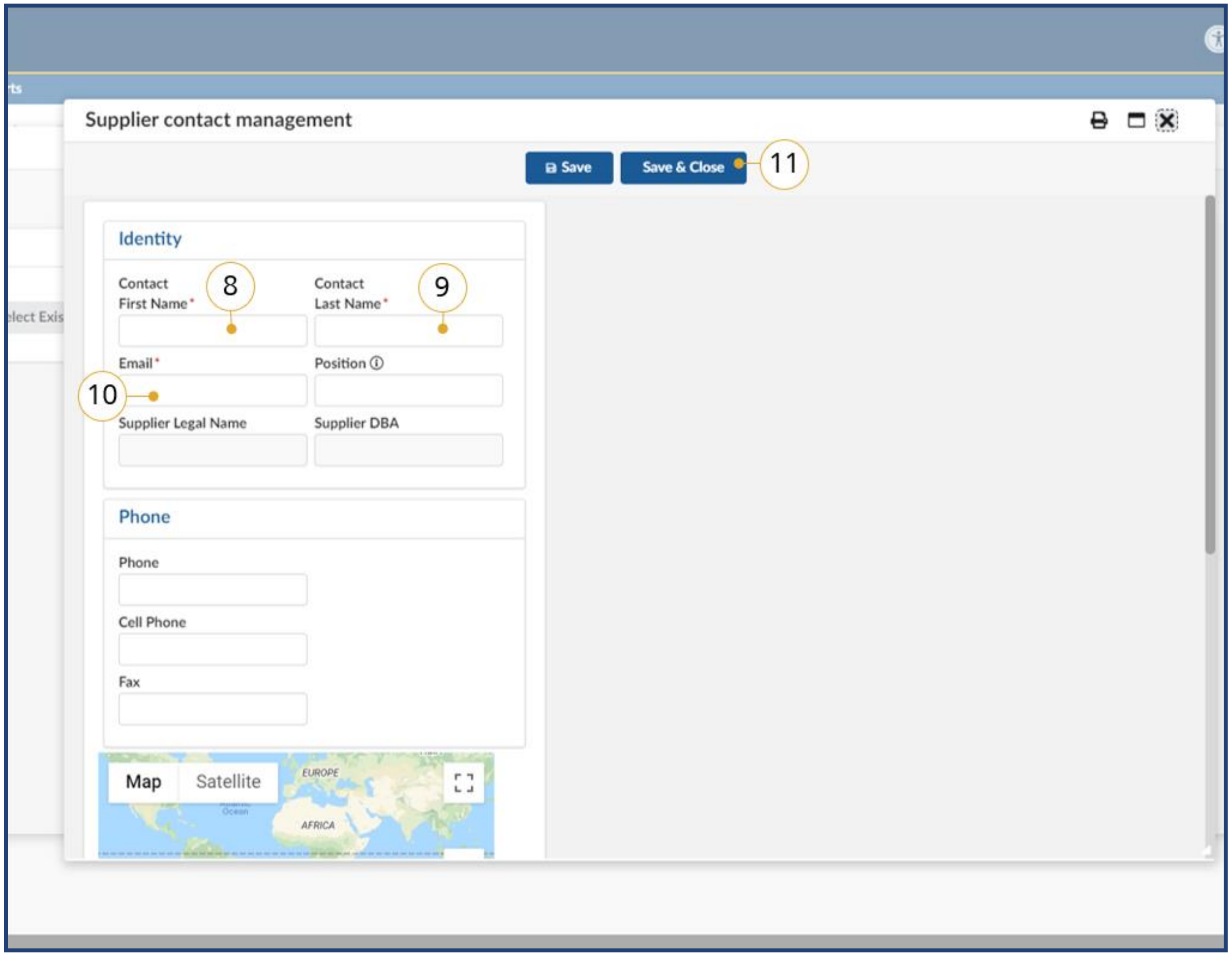


1. In the Doing Business as Name textbox, enter the business name the Supplier is operating as.
2. In the **Type** drop-down list select Vendor or Shell for offline Submissions, as applicable.
3. In the Legal Name textbox, enter the Suppliers legal name.
4. In the **Country** drop-down list, select the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

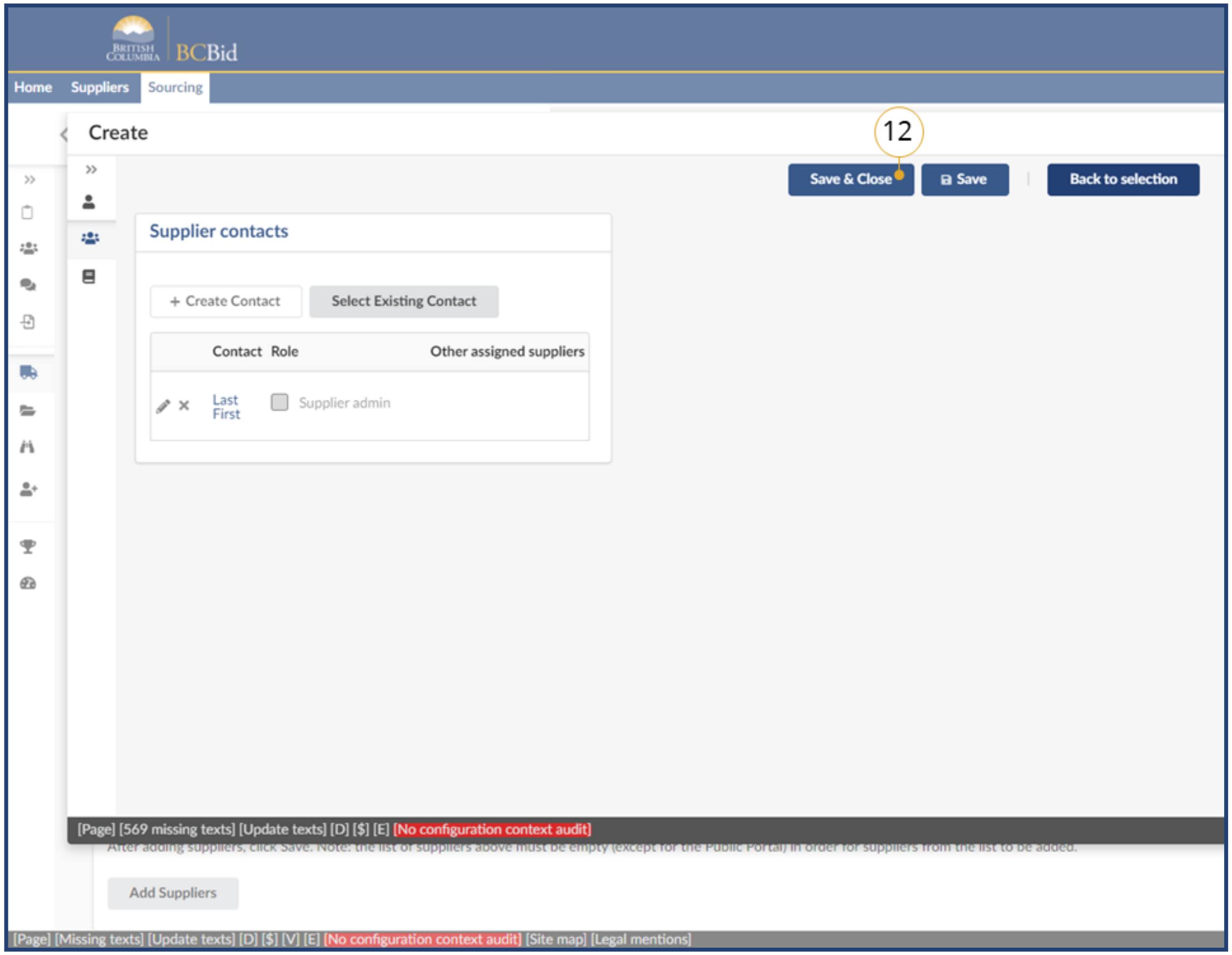
Note: SHELL supplier accounts require an address to comply with trade agreement requirements.



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

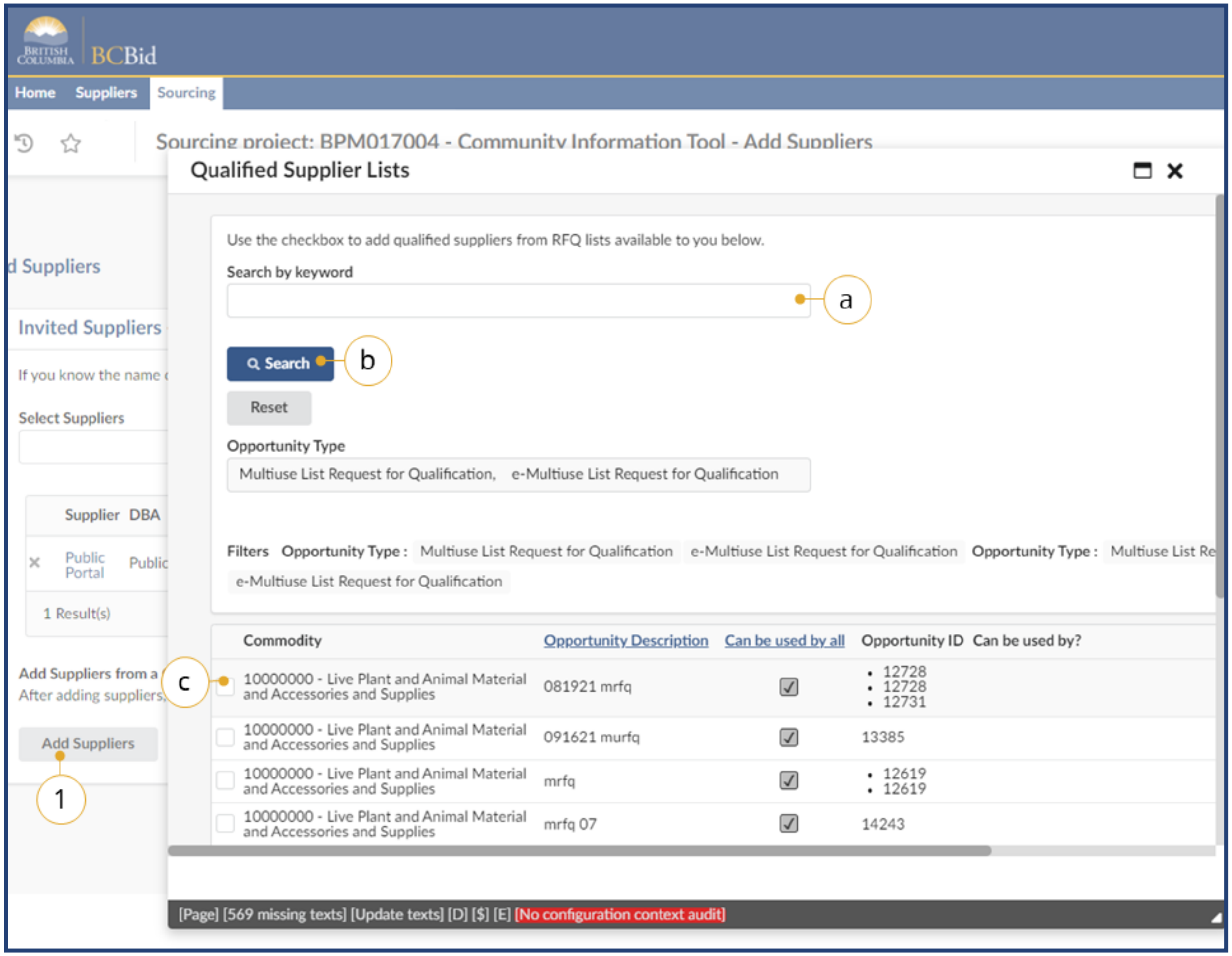


8. In the **Contact First Name** textbox, enter the Supplier contact's first name.
9. In the **Contact Last Name** textbox, enter the Supplier contact's last name
10. In the **Email** textbox, enter the Supplier contact's email address.
11. Click **Save & Close**.



12. Click **Save & Close**.

Adding Suppliers From a Qualified Suppliers List



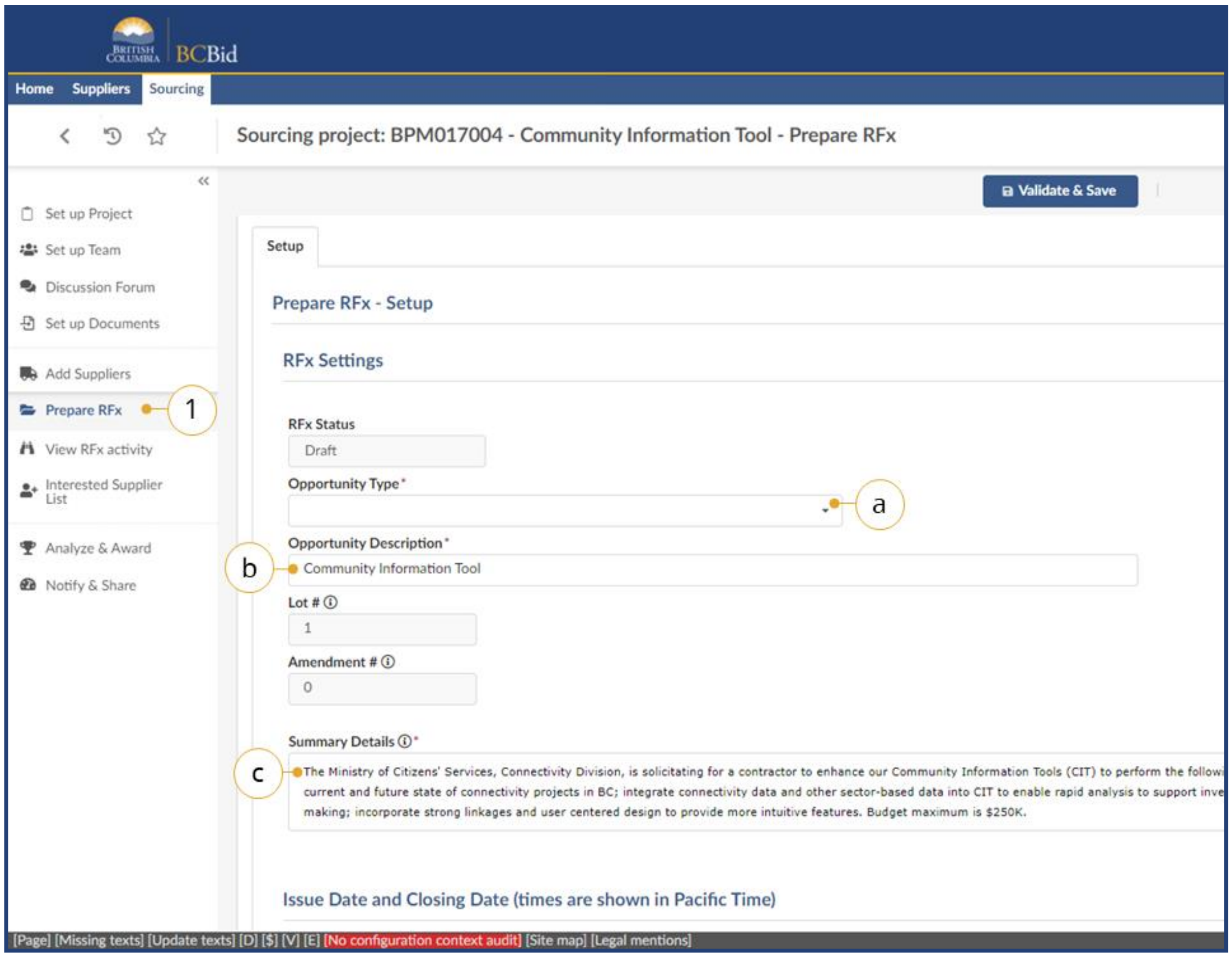
1. Click **Add Suppliers**.
    a. Insert a keyword in the **Search by keyword** textbox.
    b. Click **Search**.
    c. When the Qualified Suppliers List is located, select the **checkbox** to add the Qualified Suppliers List.
    d. Click **Save** after the Qualified Suppliers List closes.

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

Step 2 – Prepare RFx

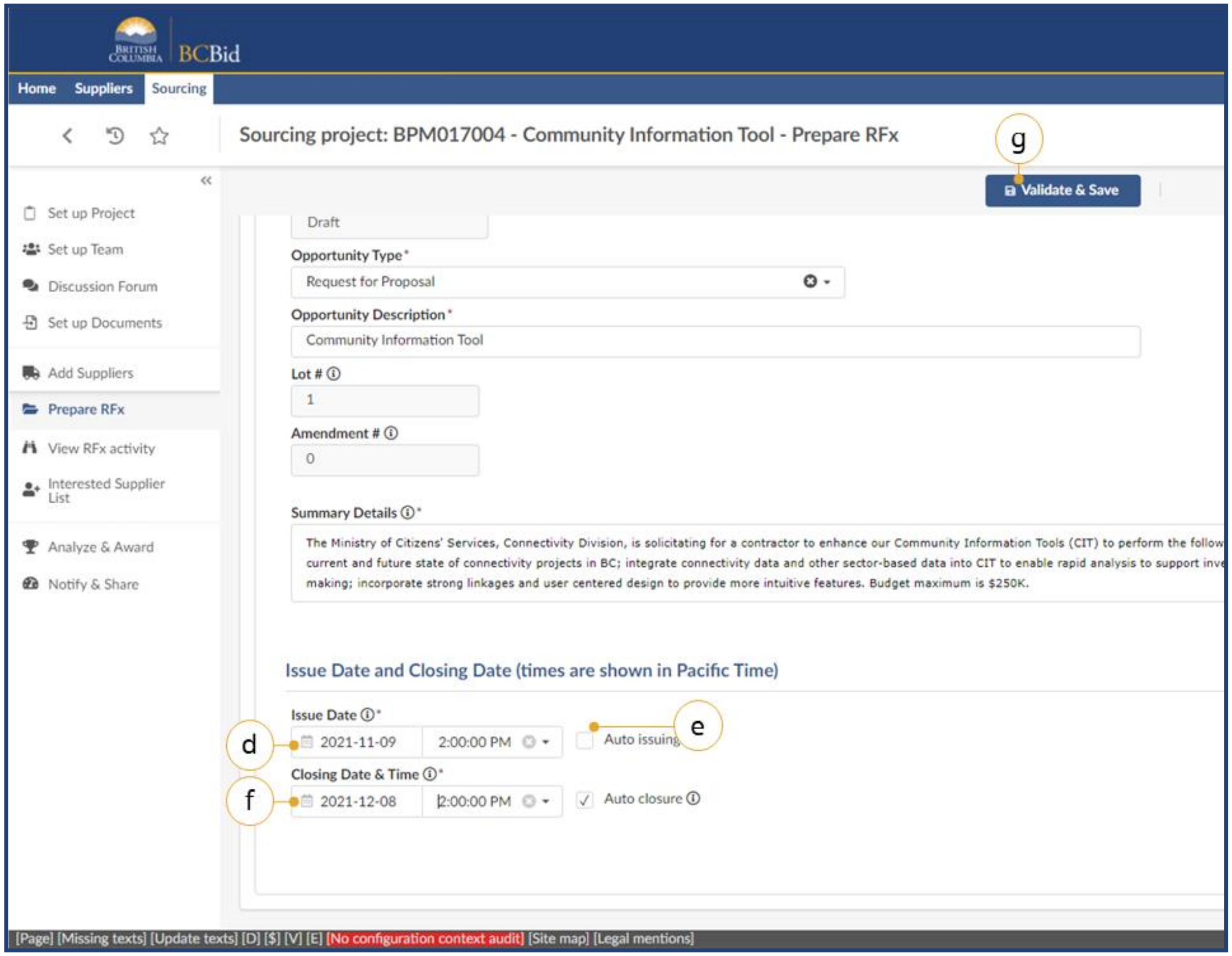
Setup

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.

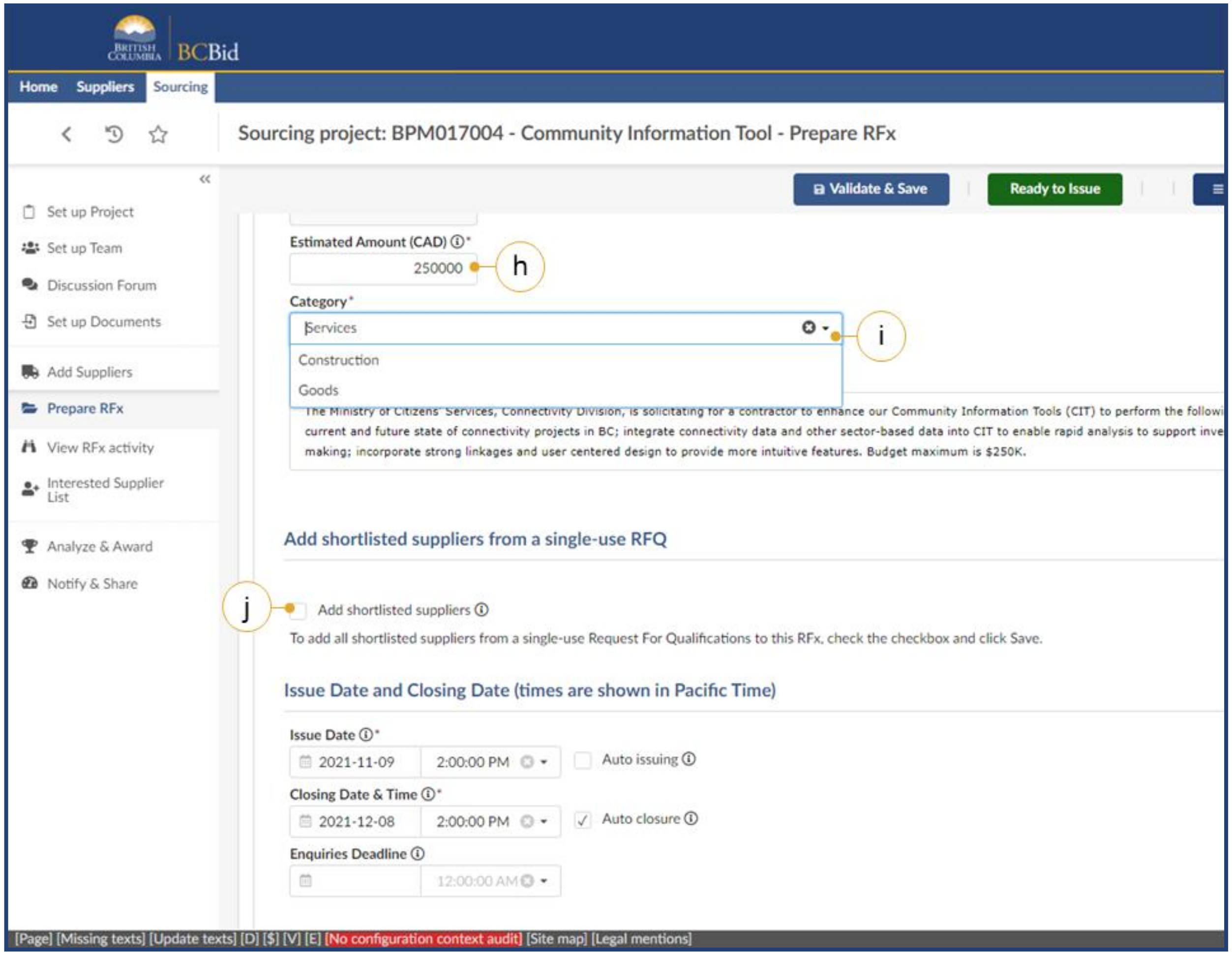
Note: Once the Opportunity Type is selected and Validate & Save is clicked, the Opportunity Type cannot be changed.



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.

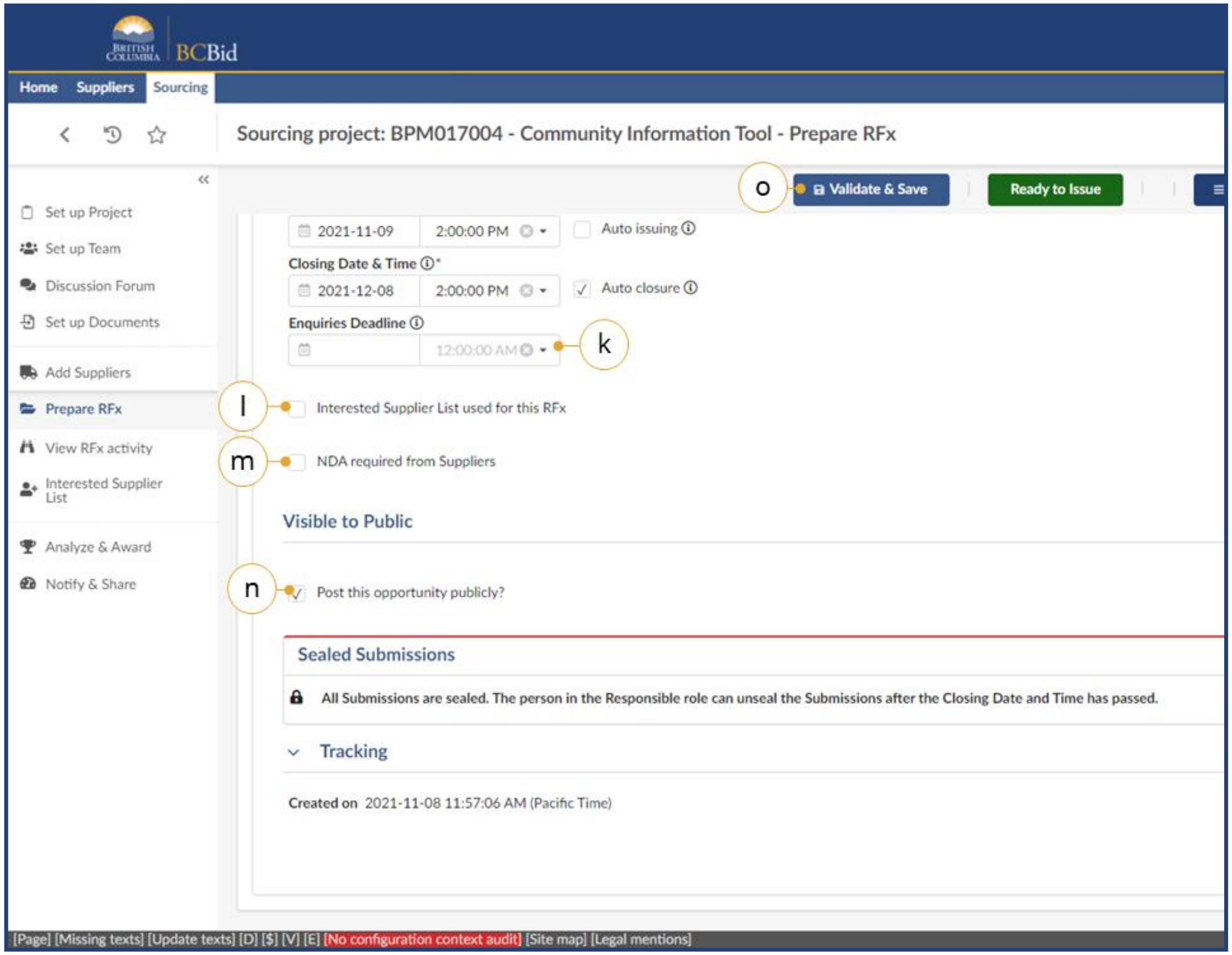
After your first Validate and Save, you may see alert/error messages related to incomplete mandatory fields in this and other tabs. Review other tabs and fill in fields. Validate and Save often. Mandatory error guidance will be visible on the Setup tab.



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.



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.

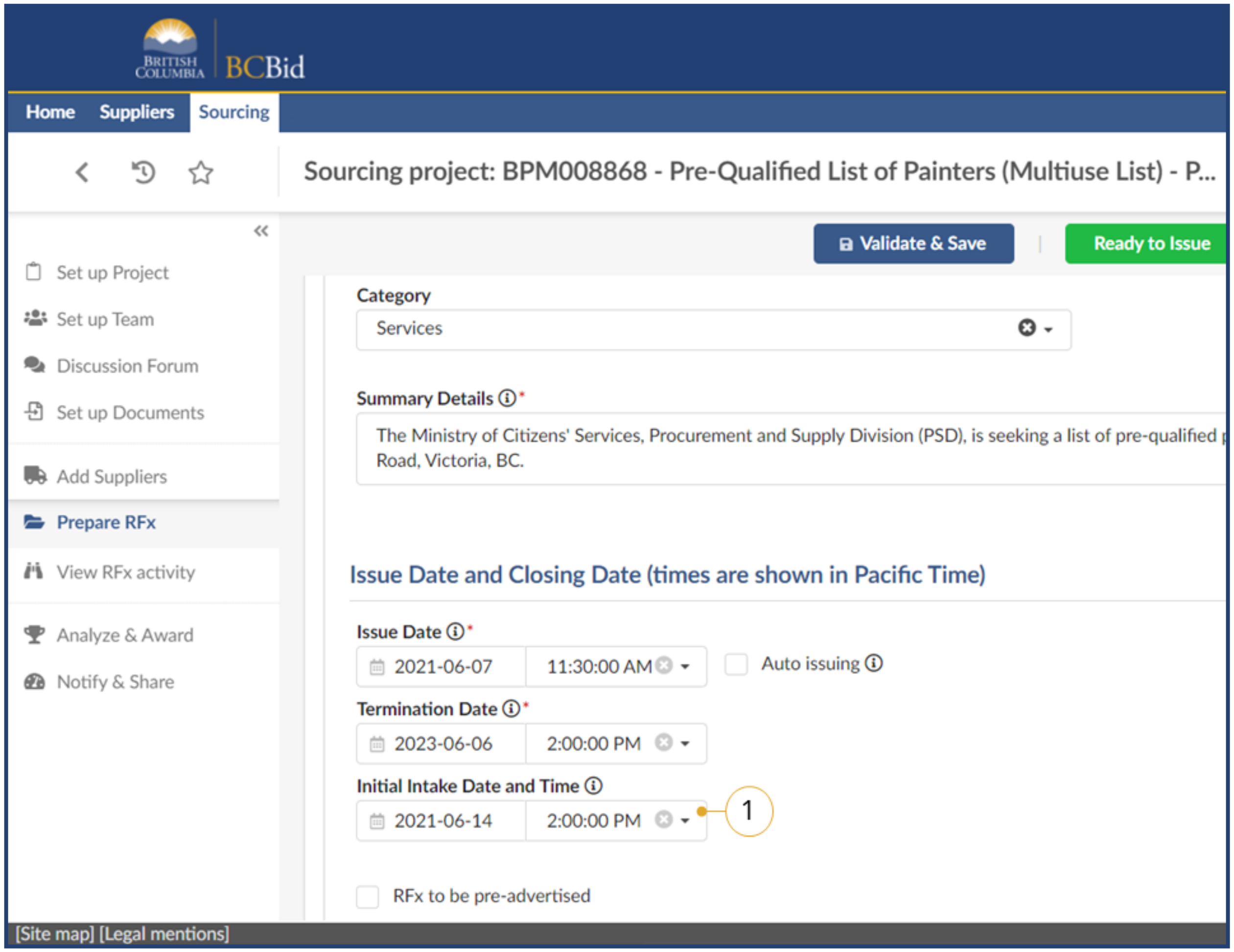
m. *Optional*: If an **NDA** is required, select the **NDA required from Suppliers** checkbox to add the NDA workflow to the Opportunity.

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**.

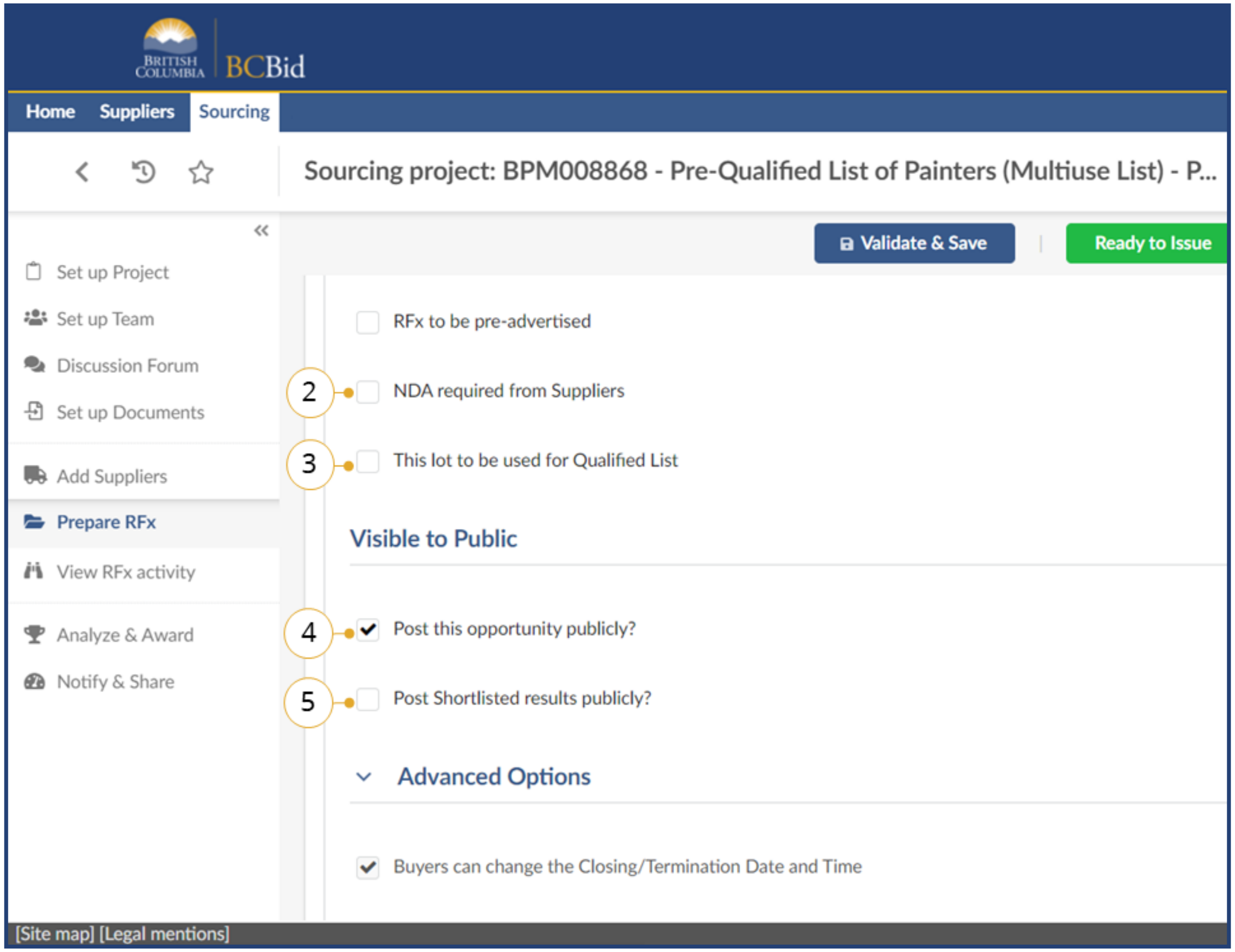
At this stage you will be prompted to complete all mandatory fields that can be found on the Additional RFx tab and the Approvals tab. For procurement processes that are not MUL, skip Multi-use List Setup and see Additional RFx.

Multi-use List Setup



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

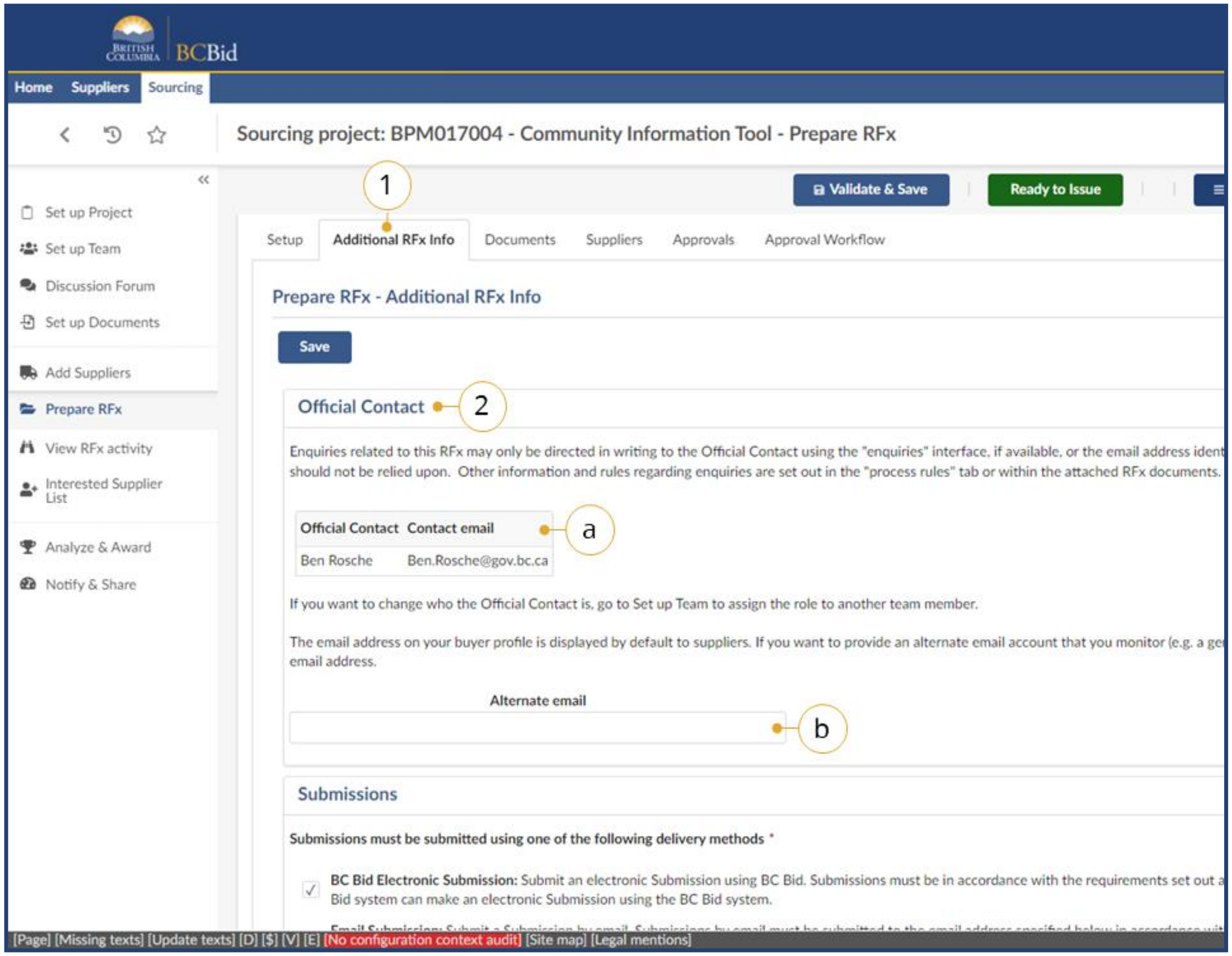
   Note: This date is visible to Suppliers.



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.

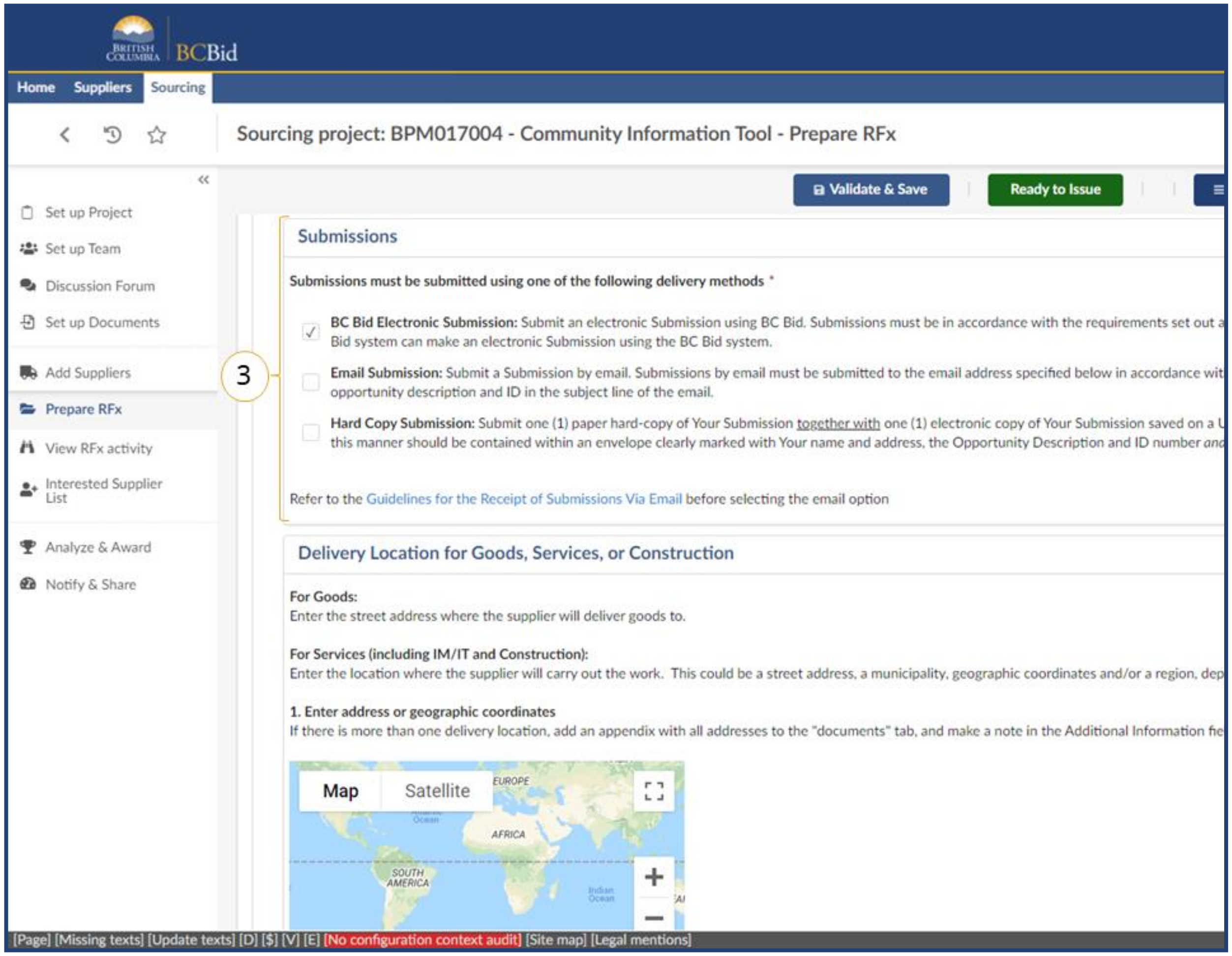
Additional RFx



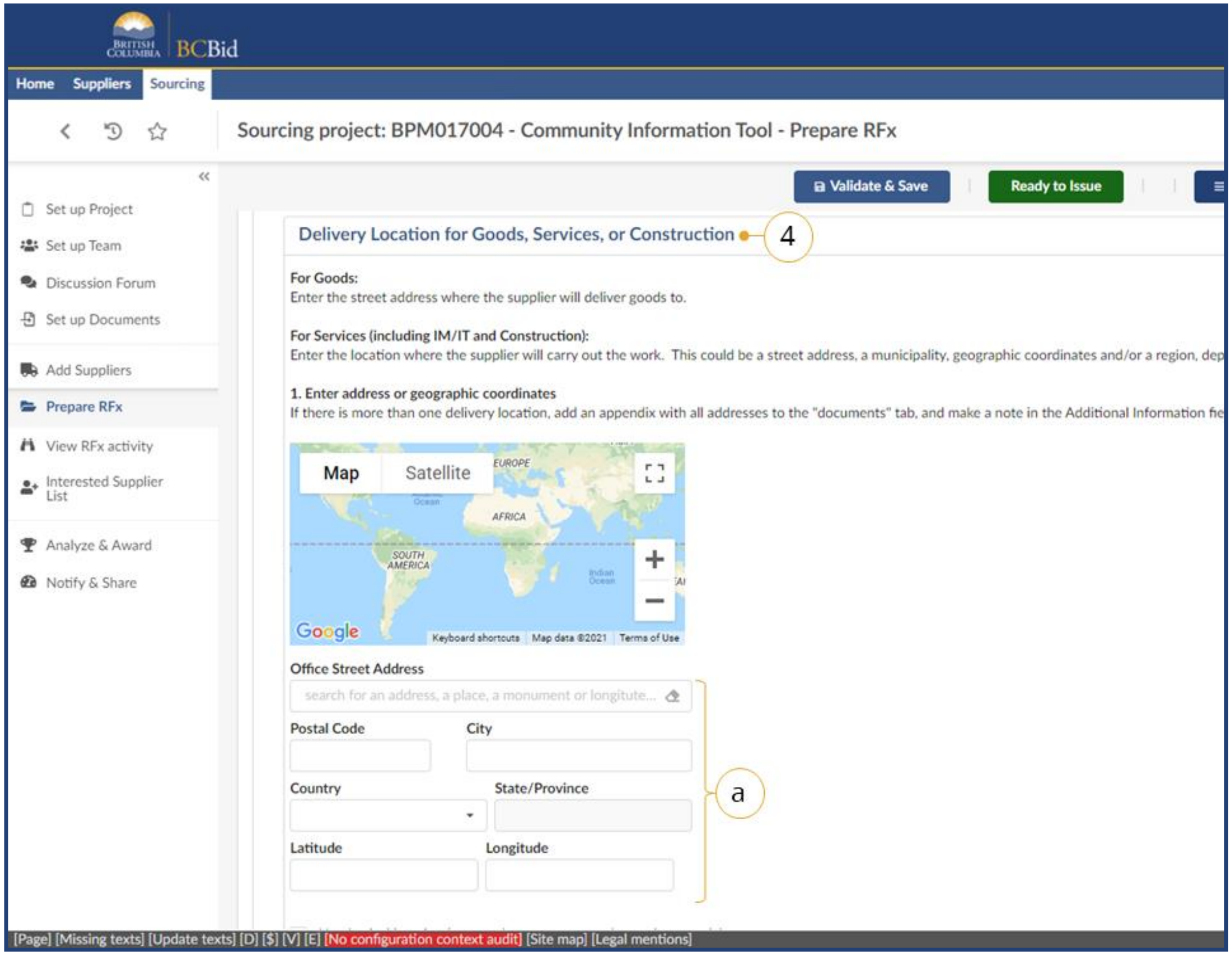
1. Click the **Additional RFx Info** tab.
2. Review the **Official Contact**.
   a. To edit the Official Contact, click **Set up Team** and change the Official Contact.
   b. *Optional*: Enter an **alternate email**, this will replace the default email address of the Official Contact.

[Additional RFx Info]

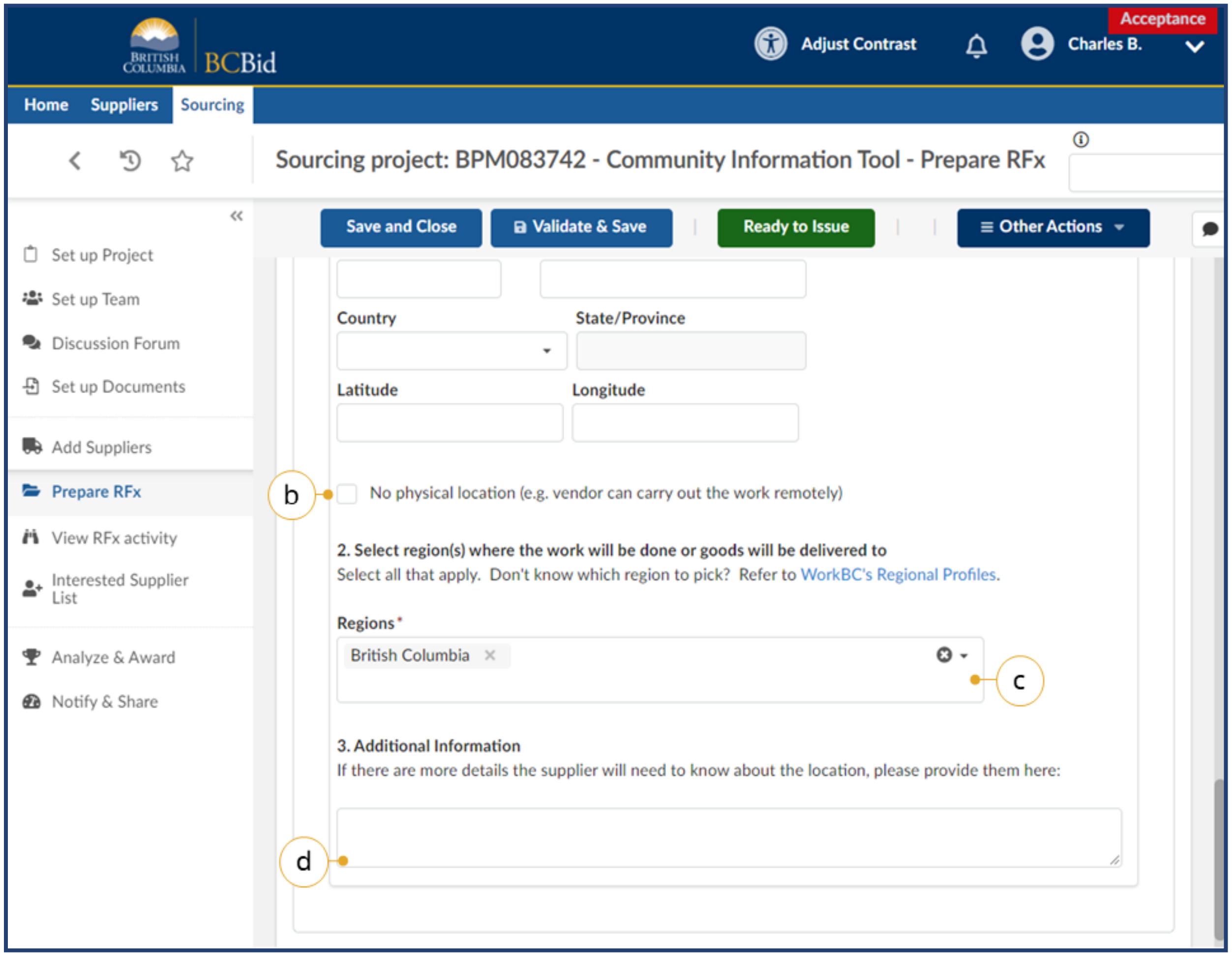
The **Save** button is different than **Validate & Save**. **Save** will save the sourcing project without checking the template for errors. **Validate & Save** will only save if all mandatory fields are filled out correctly.



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.

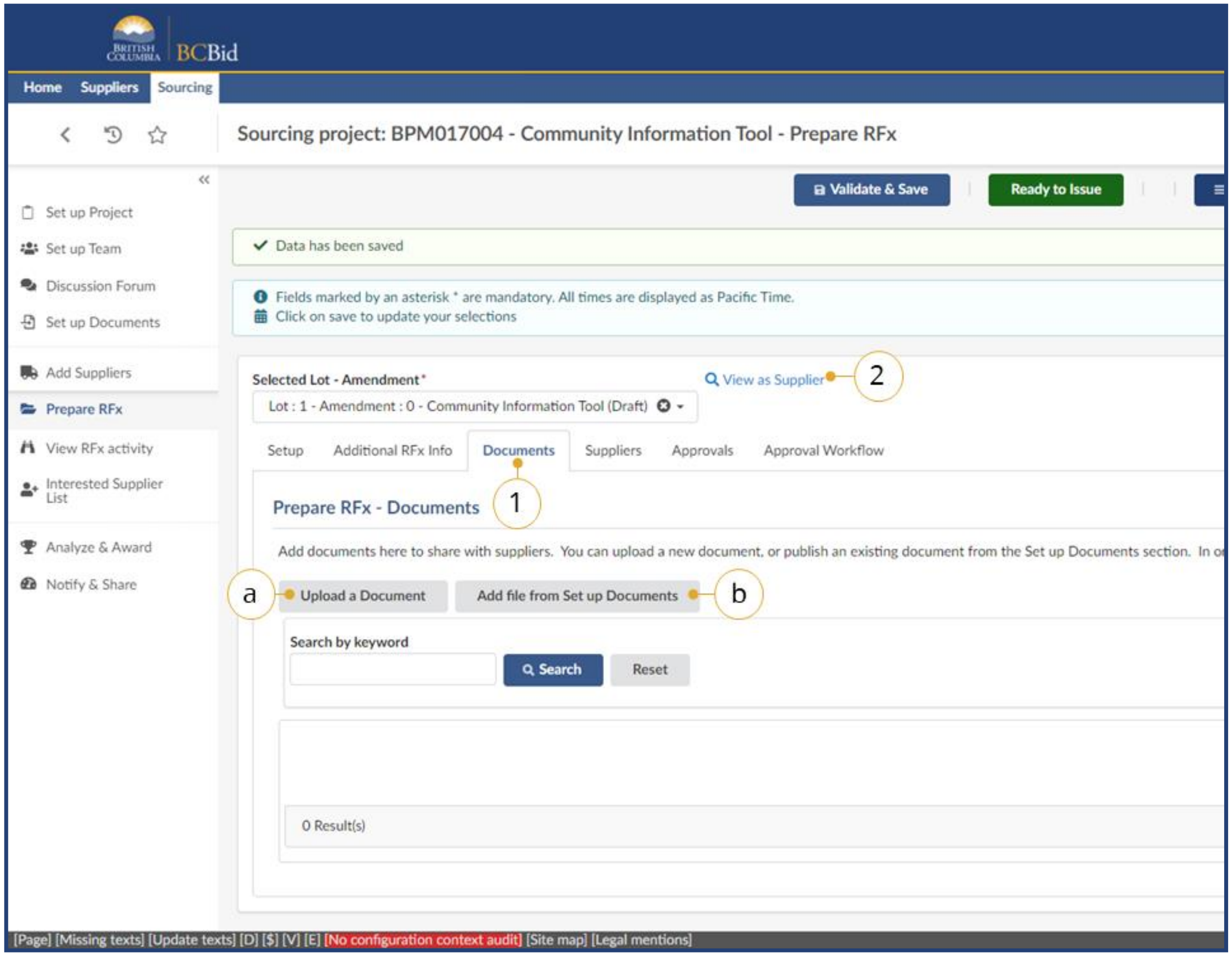


4. On the same page in the **Delivery Location** for **Goods, Service or Construction** section.
    a. Enter a location**.**



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.

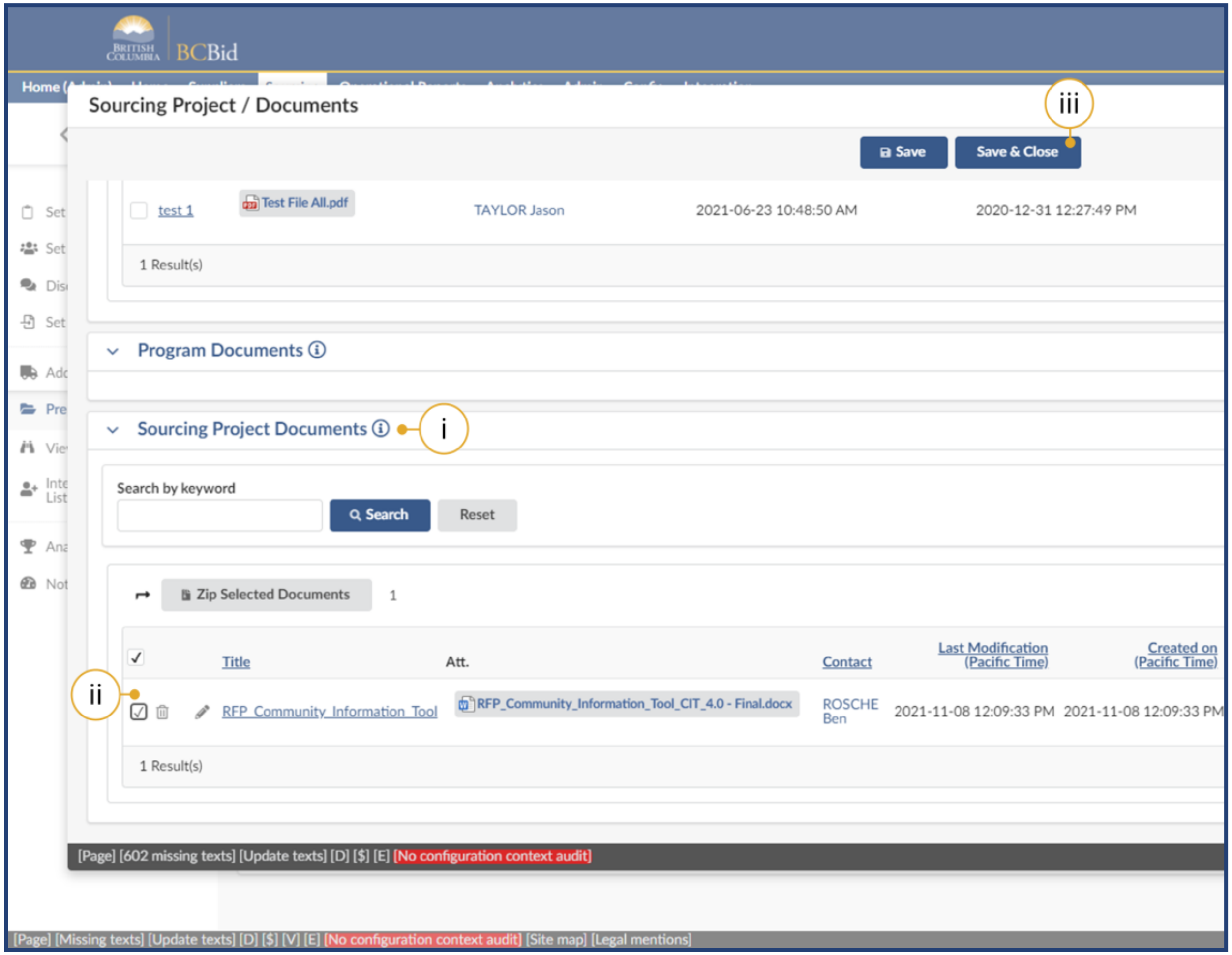
Documents



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.

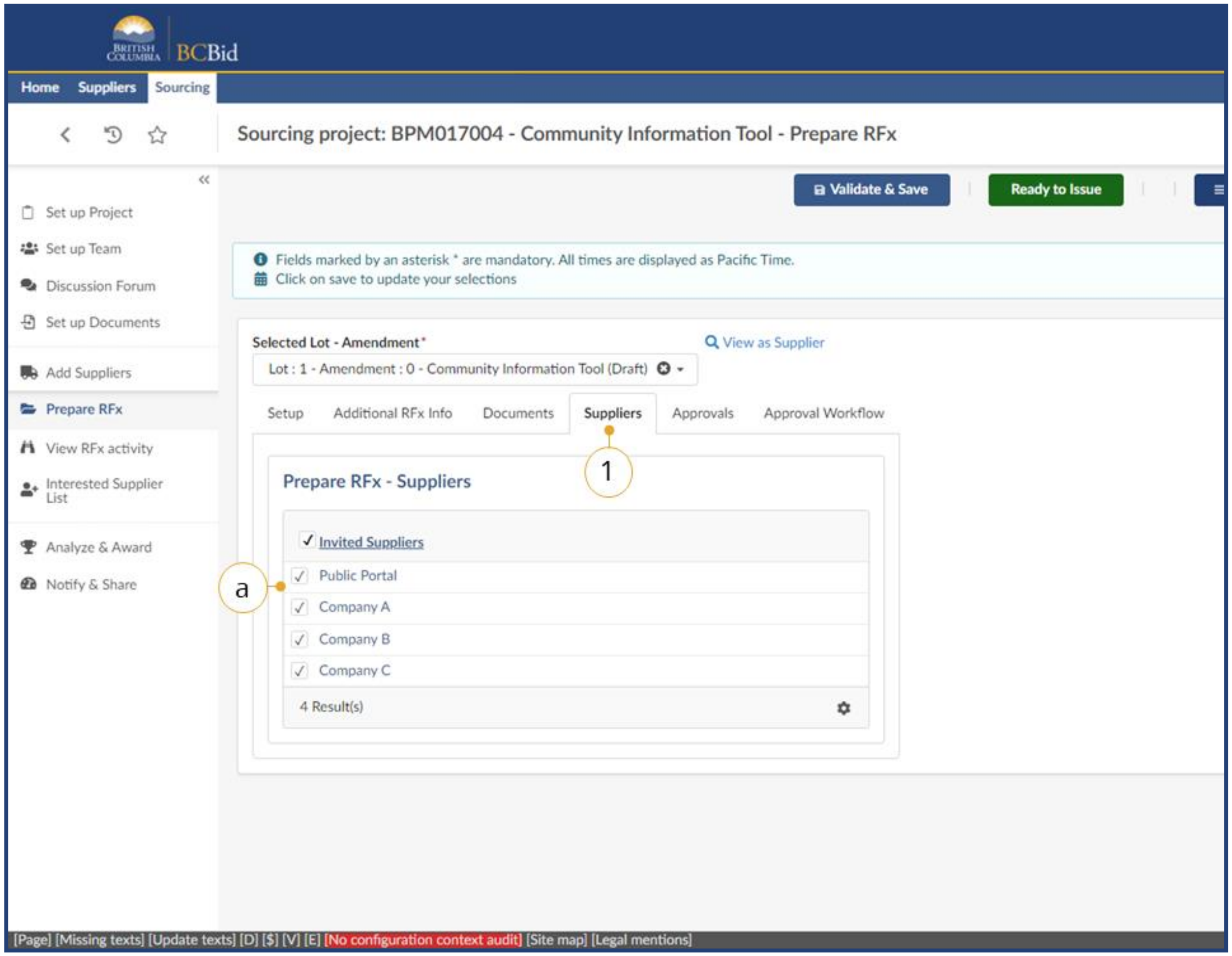
Uploading Existing Documents



- 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]

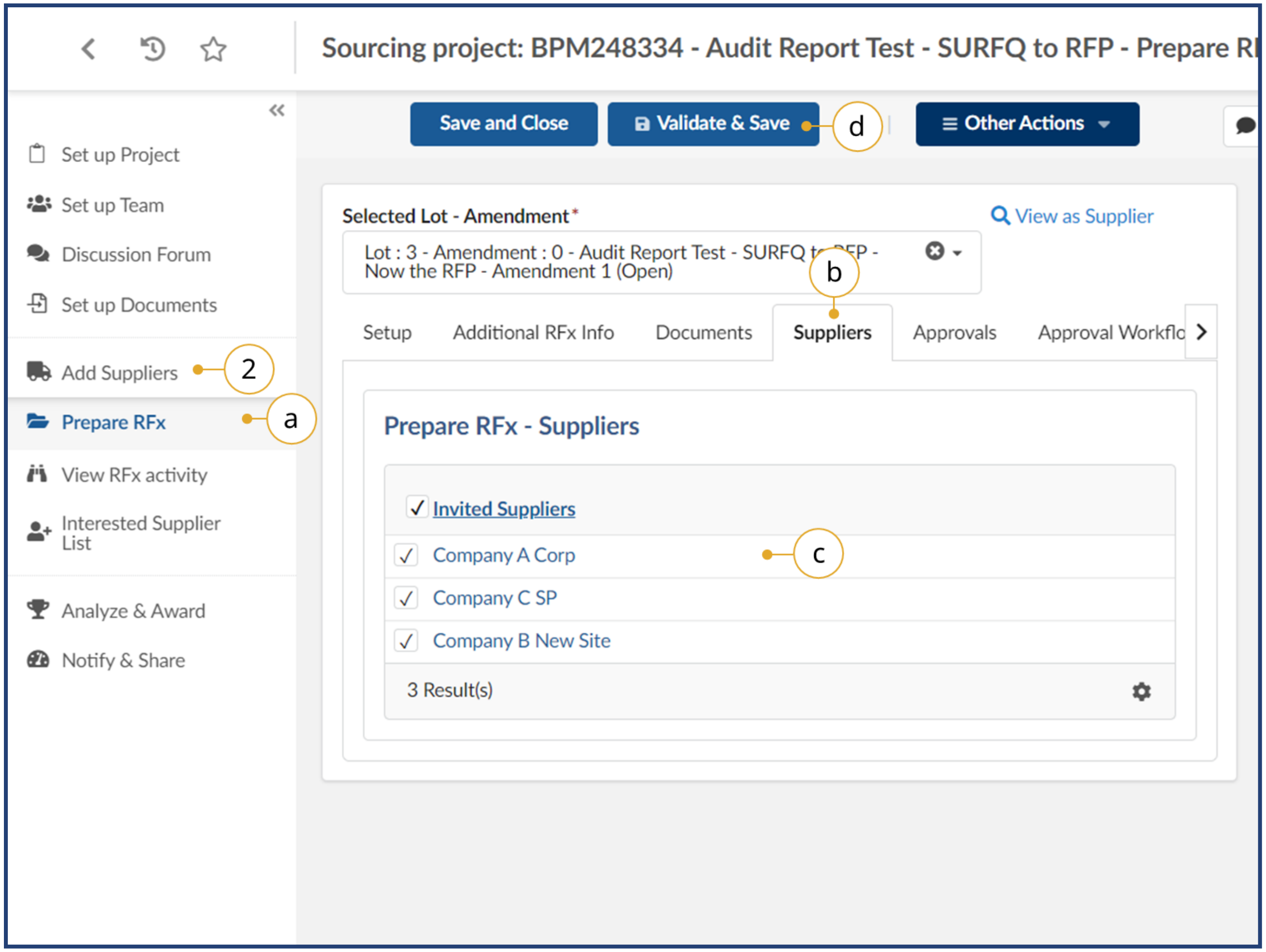
Suppliers



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.

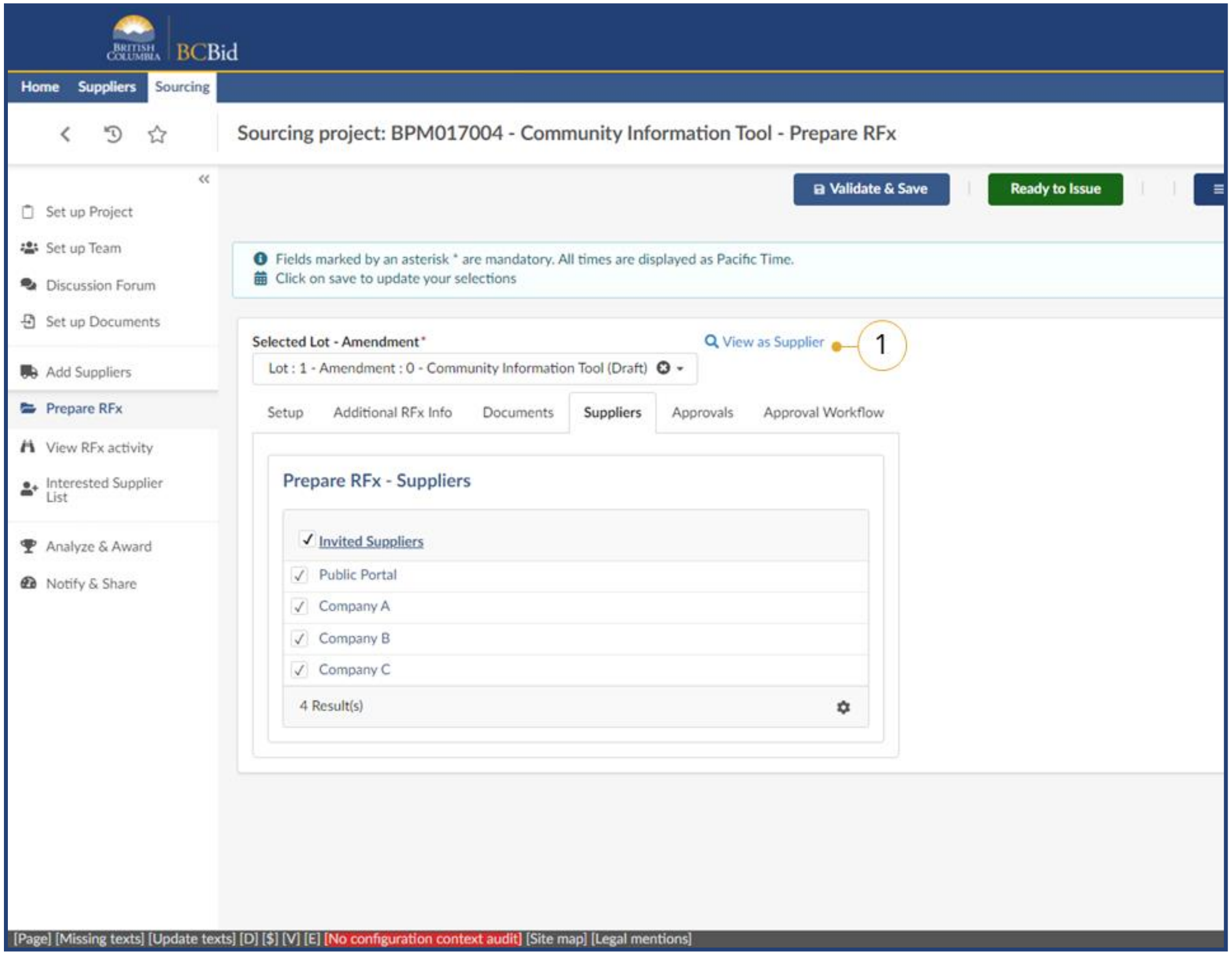


2. Optional: To add additional Suppliers, return to the **Add Suppliers** tab.
3. If additional supplier(s) were added on the Add Suppliers tab:
   a. Click on **Prepare RFx**.
   b. Click on **Suppliers**.
   c. Confirm that the added supplier(s) is listed.
   d. Click **Validate & Save**.

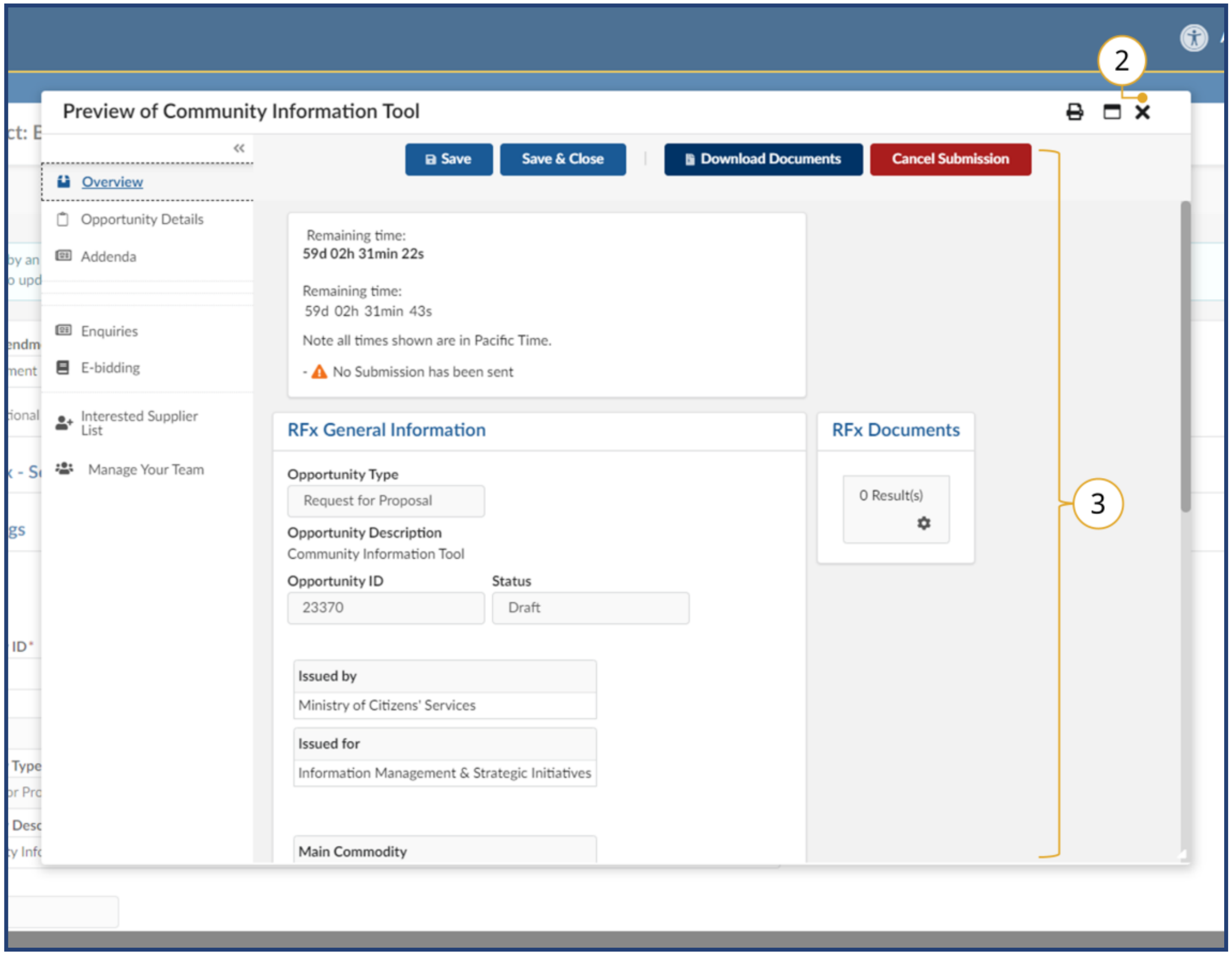
NOTE: When adding suppliers, Shell Suppliers will be marked with **[SHELL (Unregistered) Supplier]** to the right of the supplier's name.

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

Check Supplier View

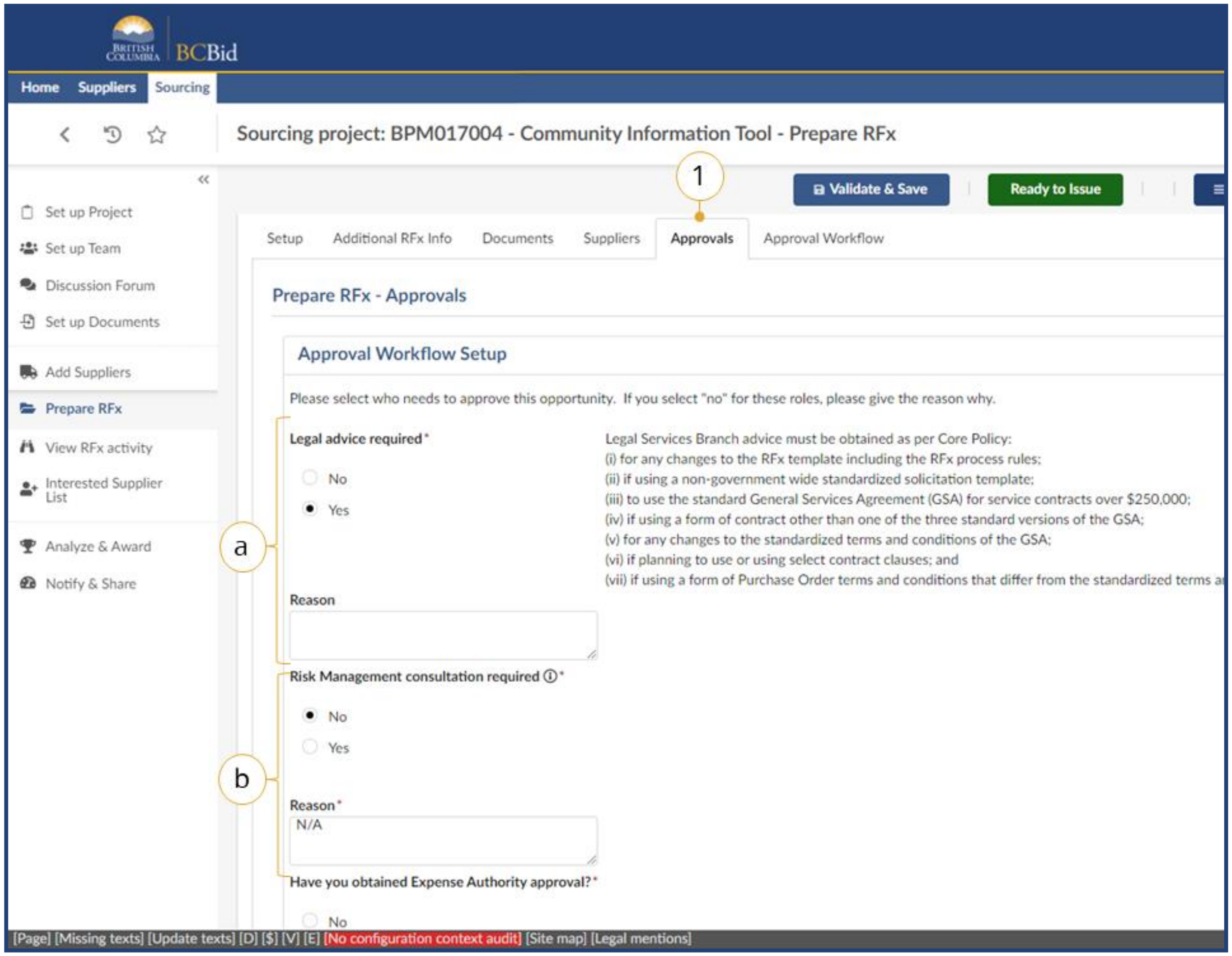


1. Click **View as Supplier** to review the Opportunity from the Supplier perspective.



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

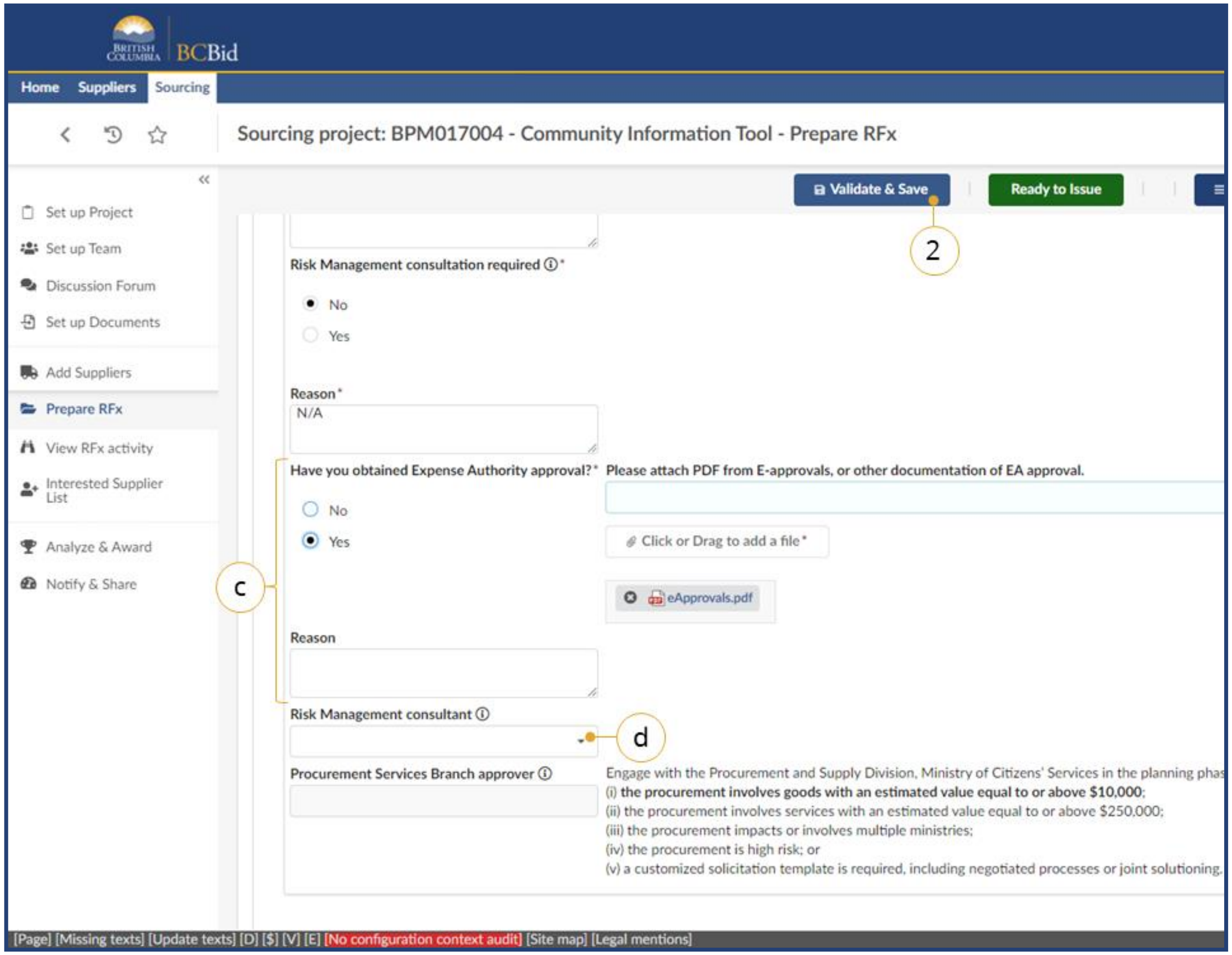
Approvals



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

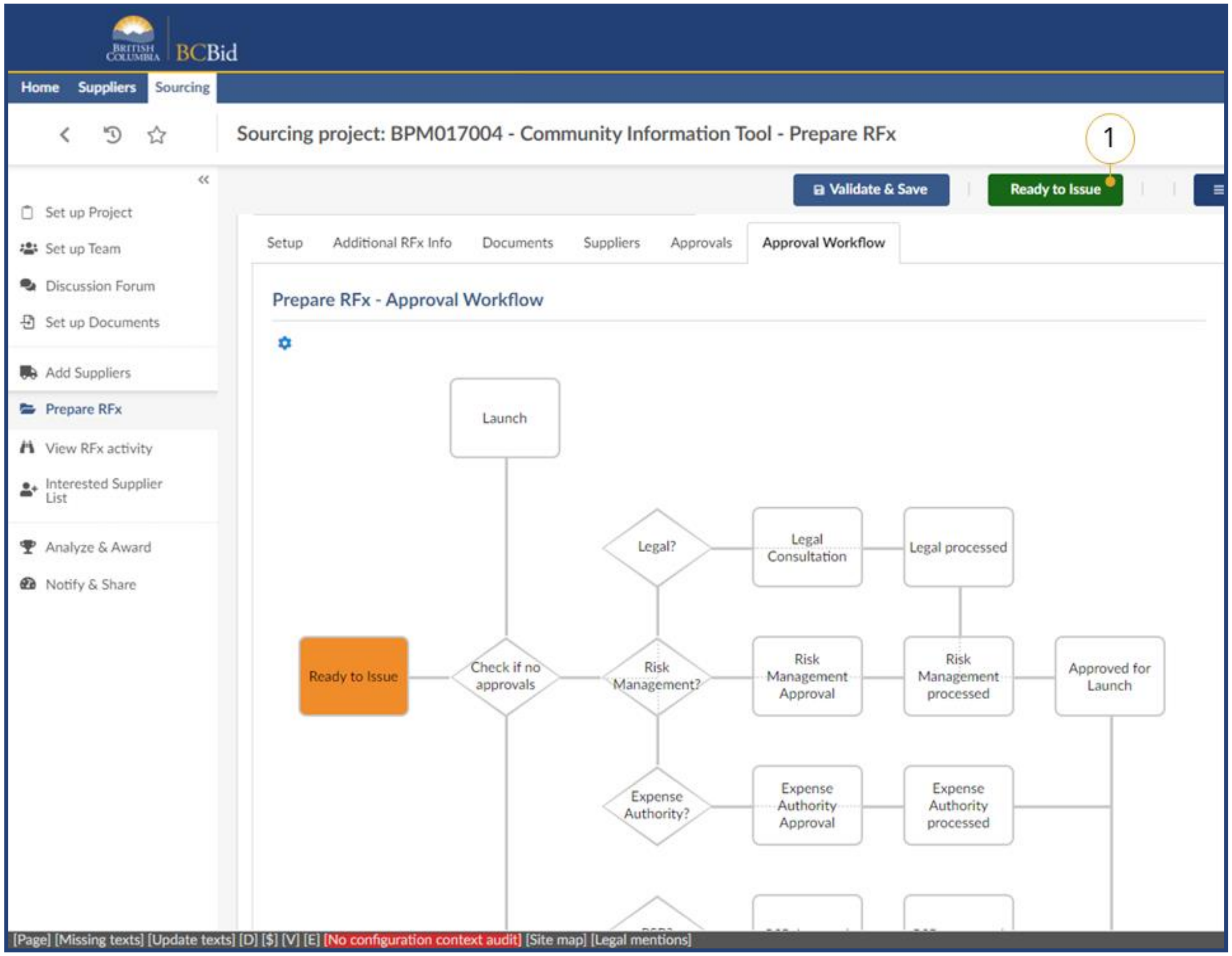
Buyers may see different approval needs depending on the Opportunity Type. Additionally, Buyers may not see the Approvals or Approval Workflow tab for their Opportunity Type, if so, progress to Step 3 – Issue an Opportunity.



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**.

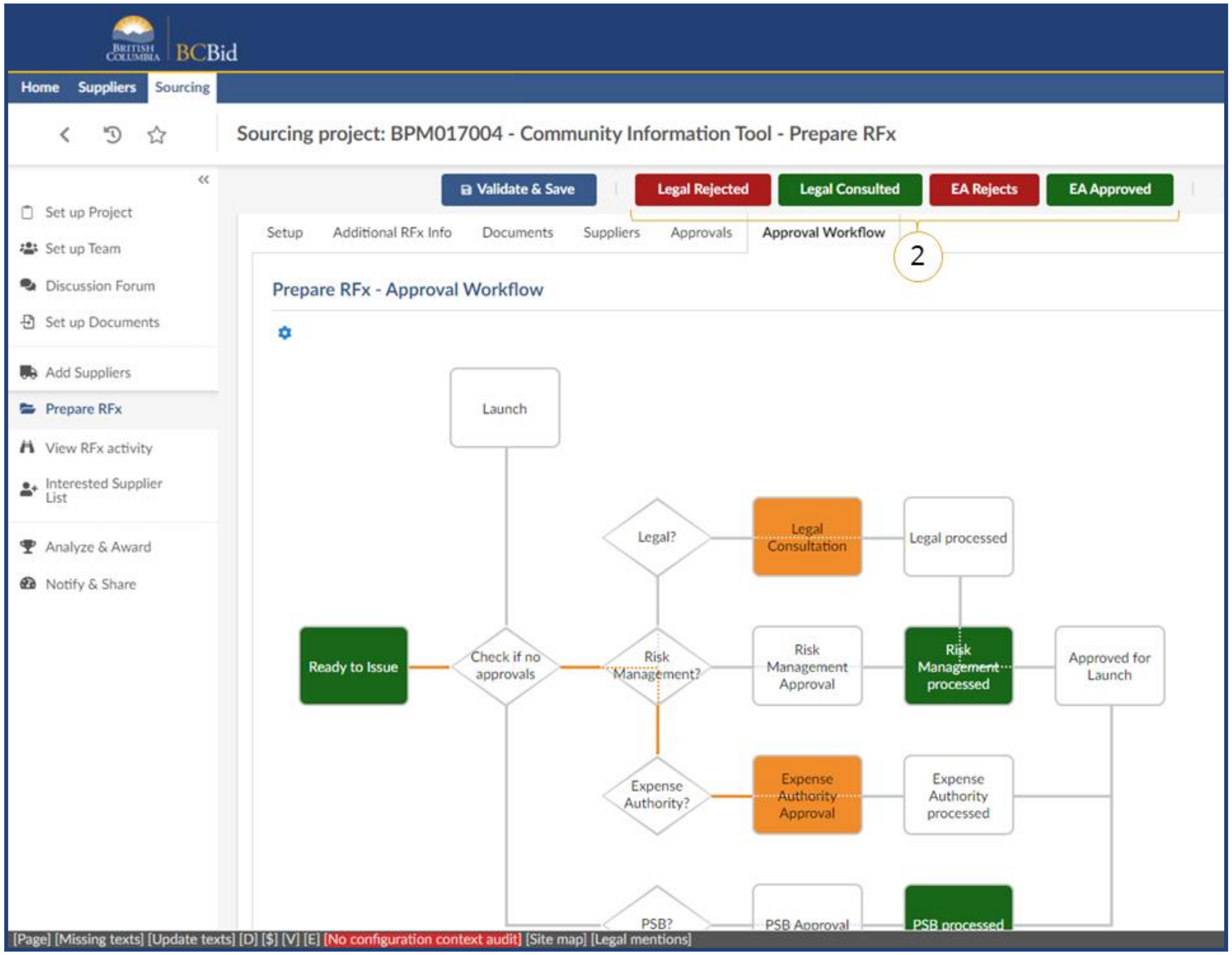
Step 3 – Issue an Opportunity



1. Click **Ready to Issue**.

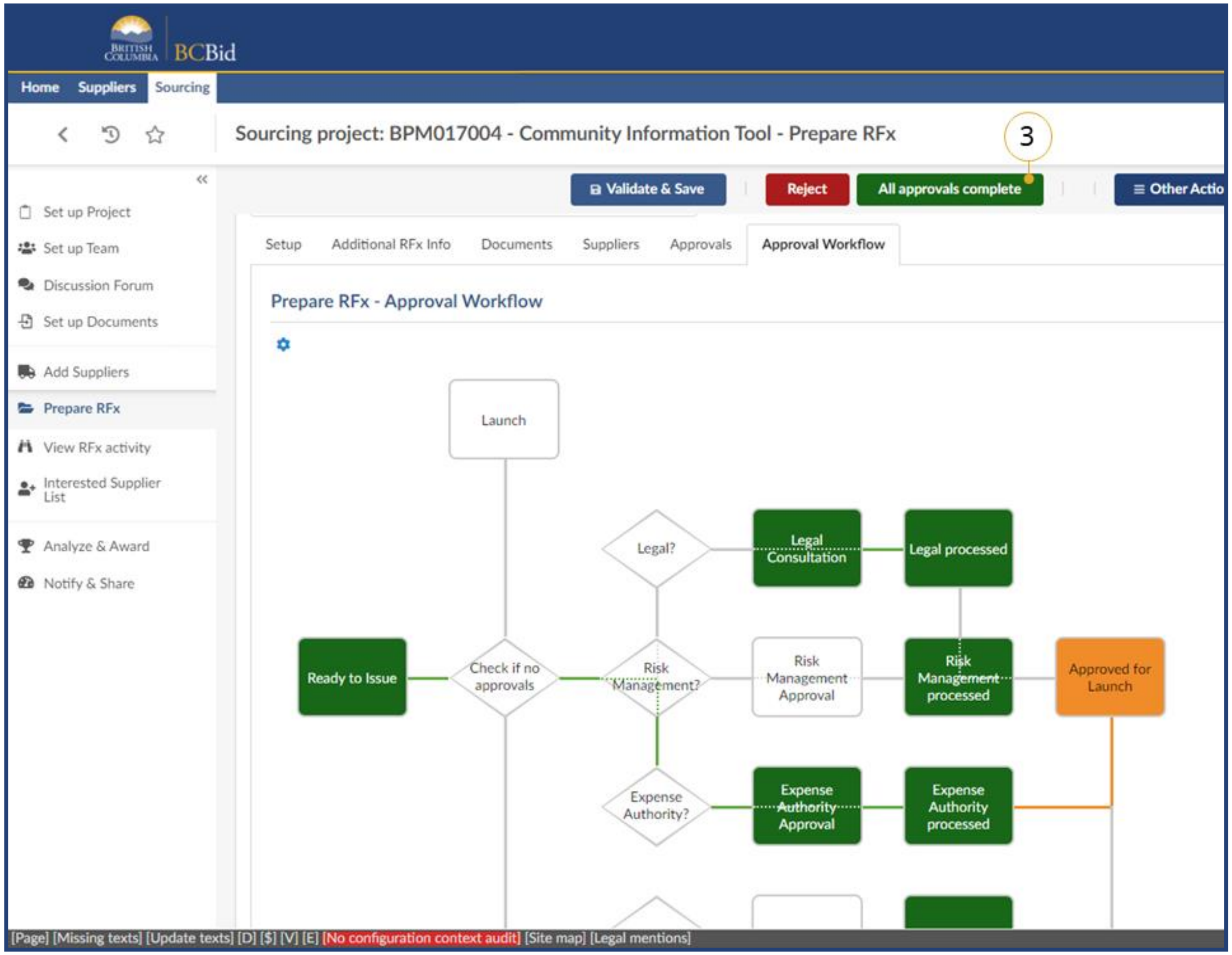
[Approvals Workflow and Issuing an Opportunity](#)

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.

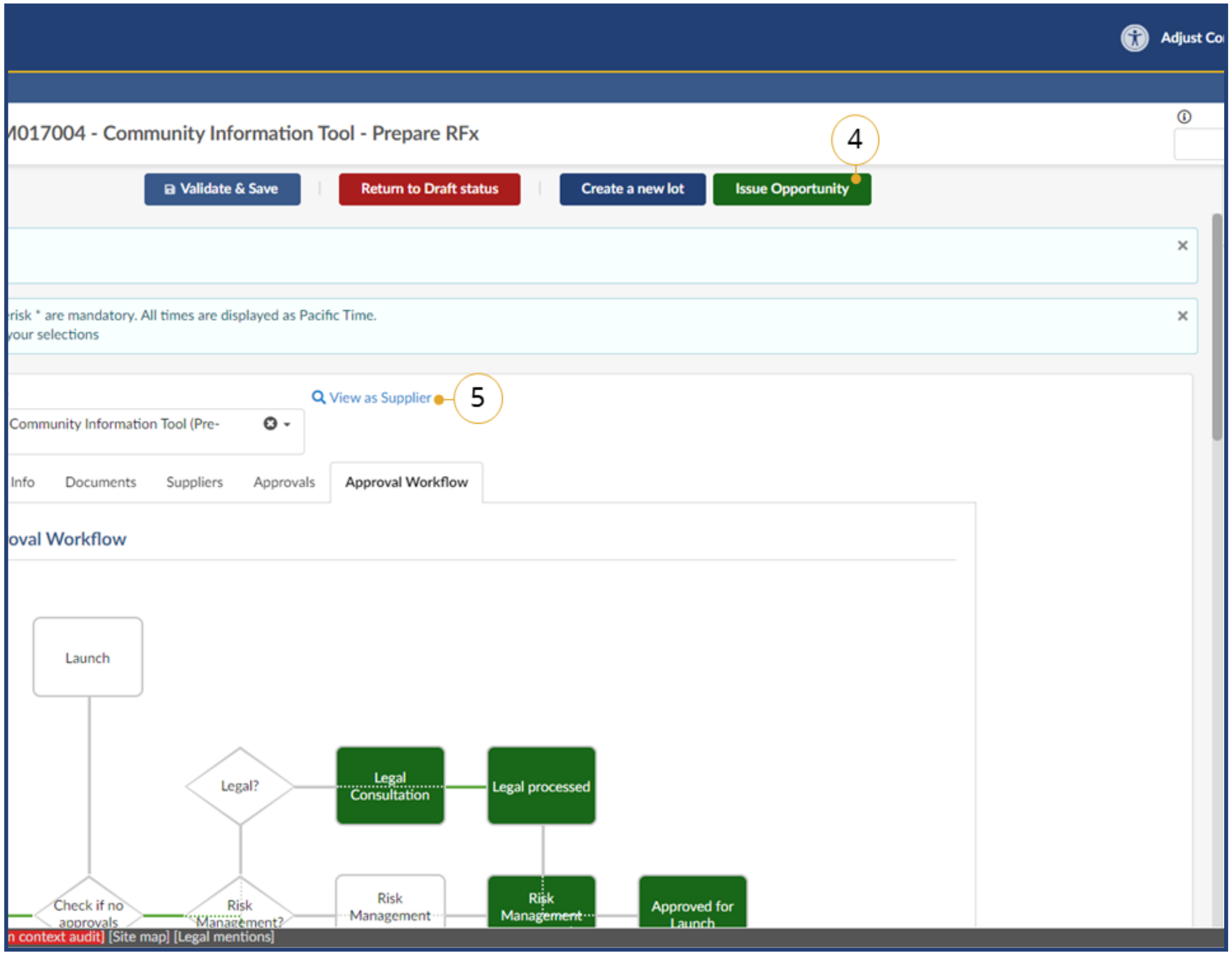


2. Click the applicable approvals or reject buttons.

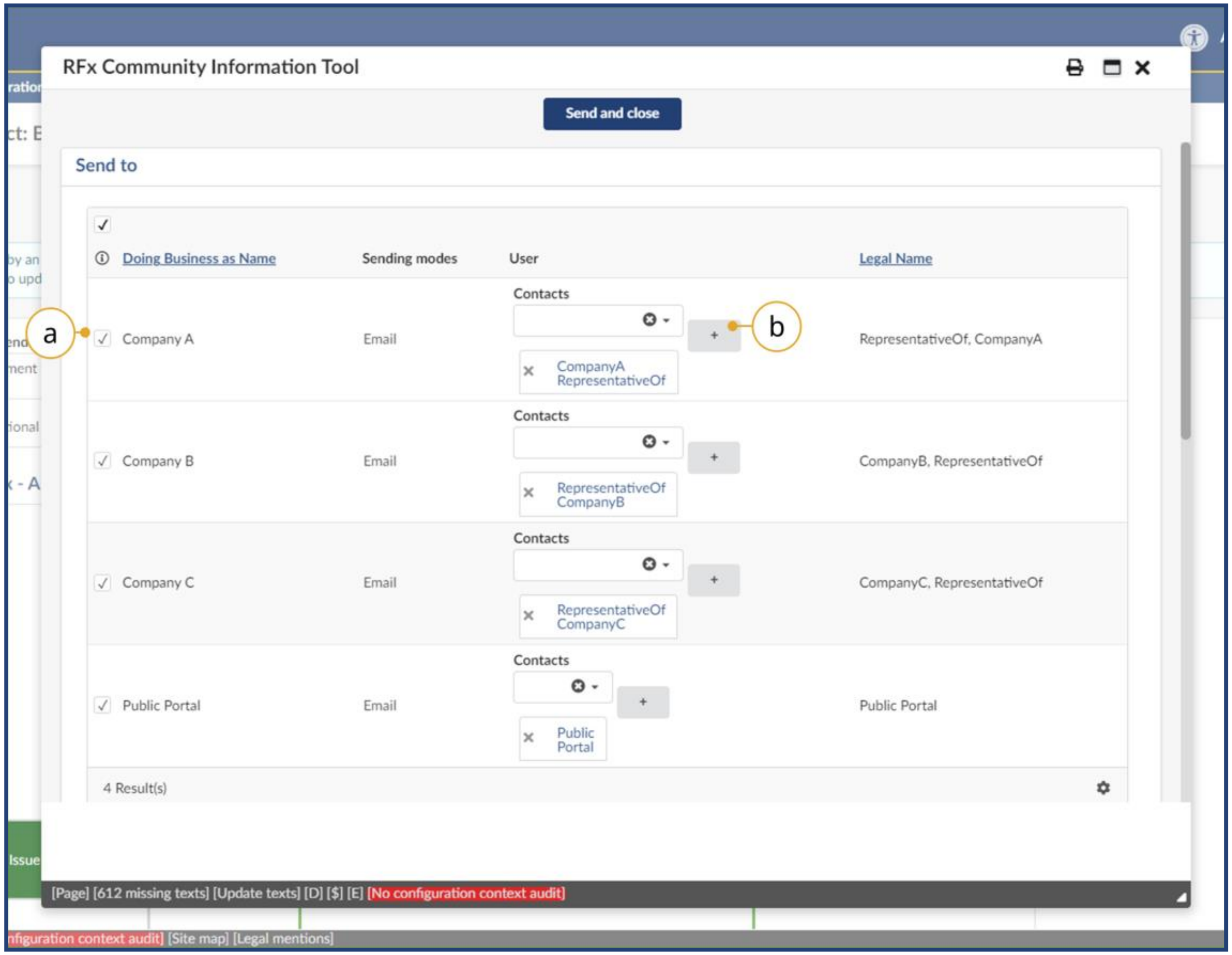
A Buyer may have more **Approved** buttons to accept prior to issuing. Selecting **Rejects** will return the Sourcing Project to draft.



3. Click **All approvals complete.**



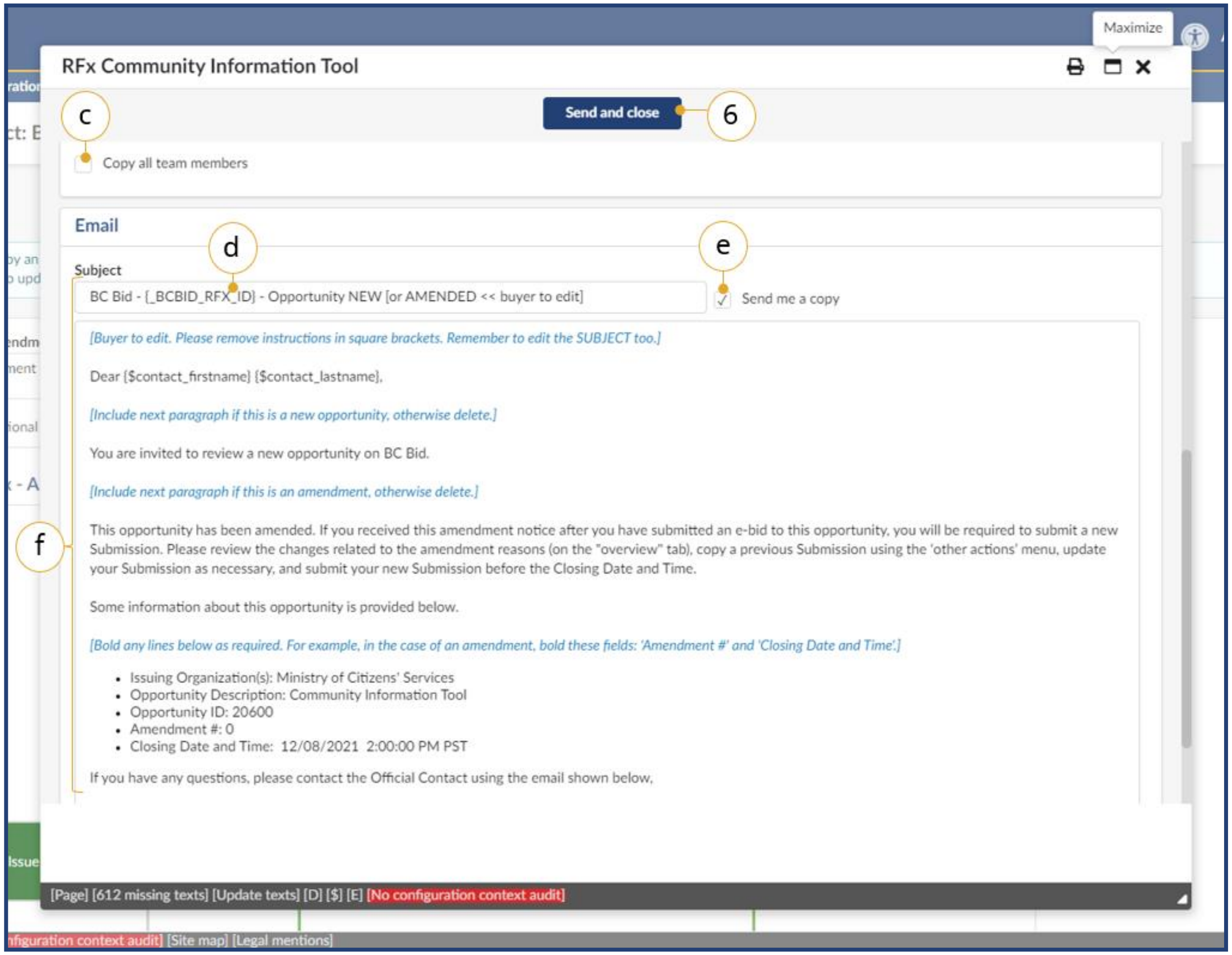
4. Click **Issue Opportunity** to open a new window.
5. Click **View as Supplier** to review the Opportunity from the Supplier perspective.



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.

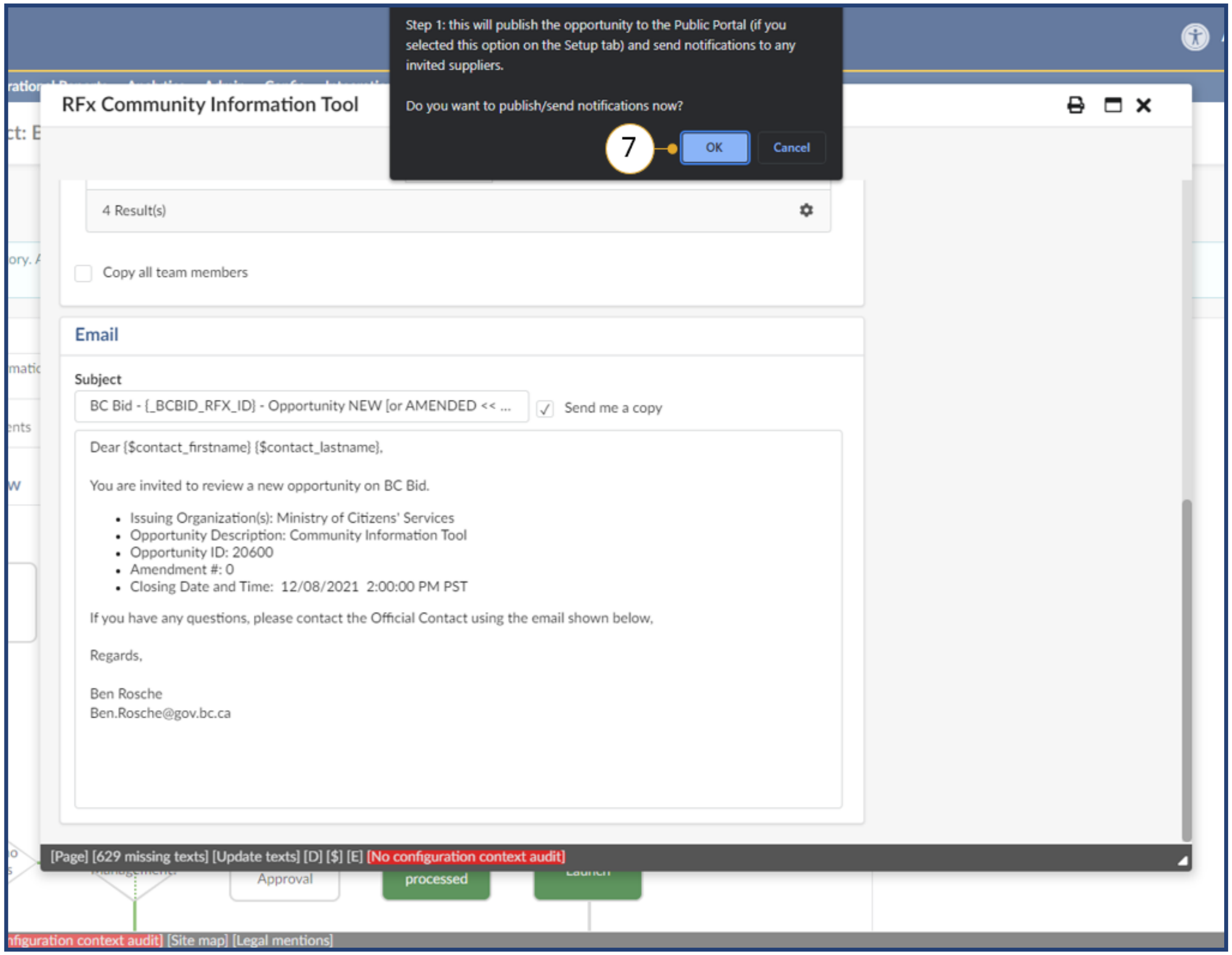
If a public opportunity and no invited suppliers are part of the process you must still send the notification to the Public Portal.



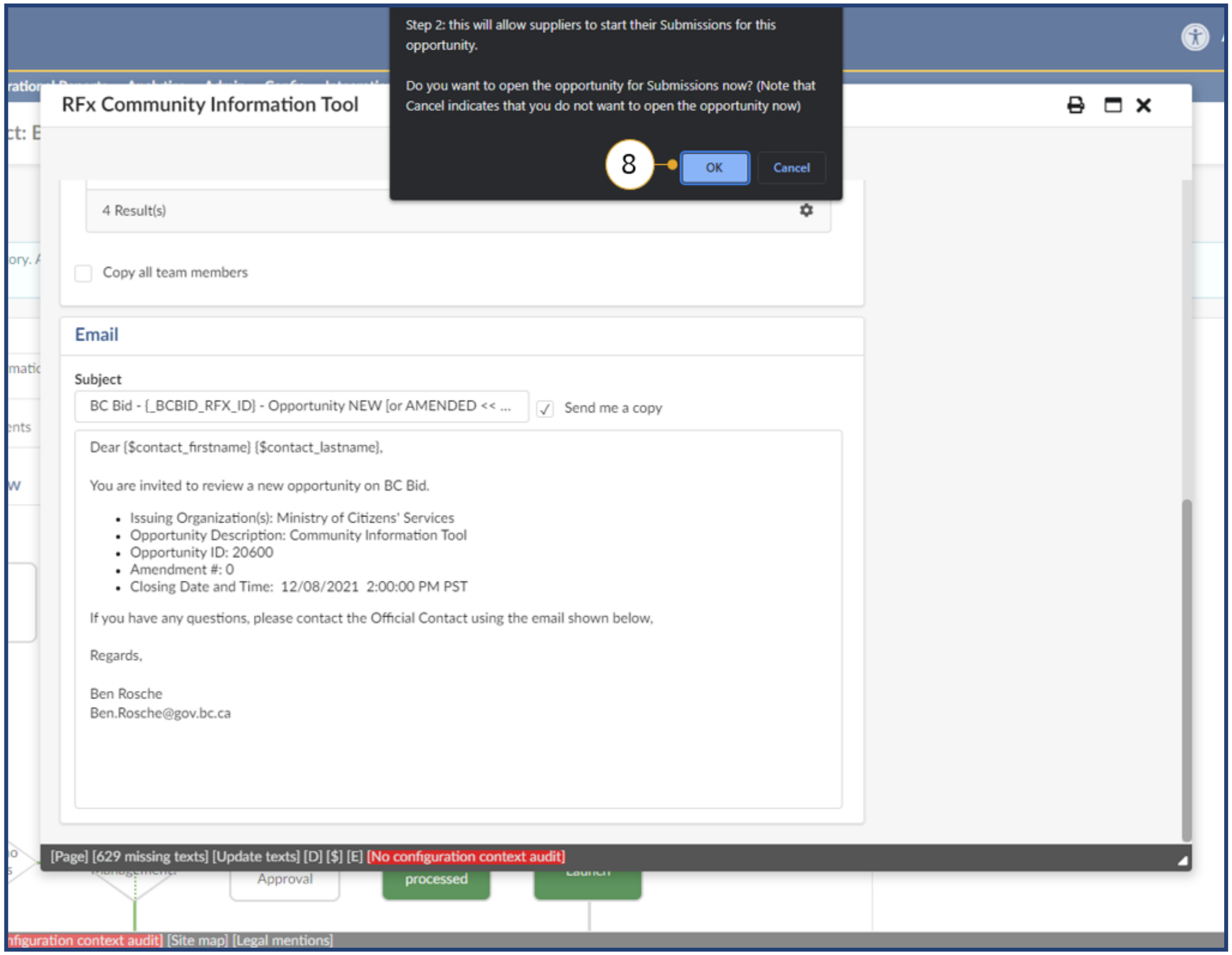
c. *Optional:* Click the **Copy all team members** checkbox to send the invitation to all team members.
d. In the **Subject** textbox, review the subject name and make the applicable edits.
e. *Optional*: Click the **Send me a copy** checkbox to receive a copy of the invitation.
f. Review the email and 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.


Step 1: this will publish the opportunity to the Public Portal (if you selected this option on the Setup tab) and send notifications to any invited suppliers.
Do you want to publish/send notifications now?
7
OK
Cancel
RFx Community Information Tool
4 Result(s)
Copy all team members
Email
Subject
BC Bid - {_BCBID_RFX_ID} - Opportunity NEW [or AMENDED << ...
Send me a copy
Dear {$contact_firstname} {$contact_lastname},
You are invited to review a new opportunity on BC Bid.
Issuing Organization(s): Ministry of Citizens' Services
Opportunity Description: Community Information Tool
Opportunity ID: 20600
Amendment #: 0
Closing Date and Time: 12/08/2021 2:00:00 PM PST
If you have any questions, please contact the Official Contact using the email shown below.
Regards,
Ben Rosche
Ben.Rosche@gov.bc.ca
[Page] [629 missing texts] [Update texts] [D] [$] [E] [No configuration context audit]
Approval
processed
[Site map] [Legal mentions]

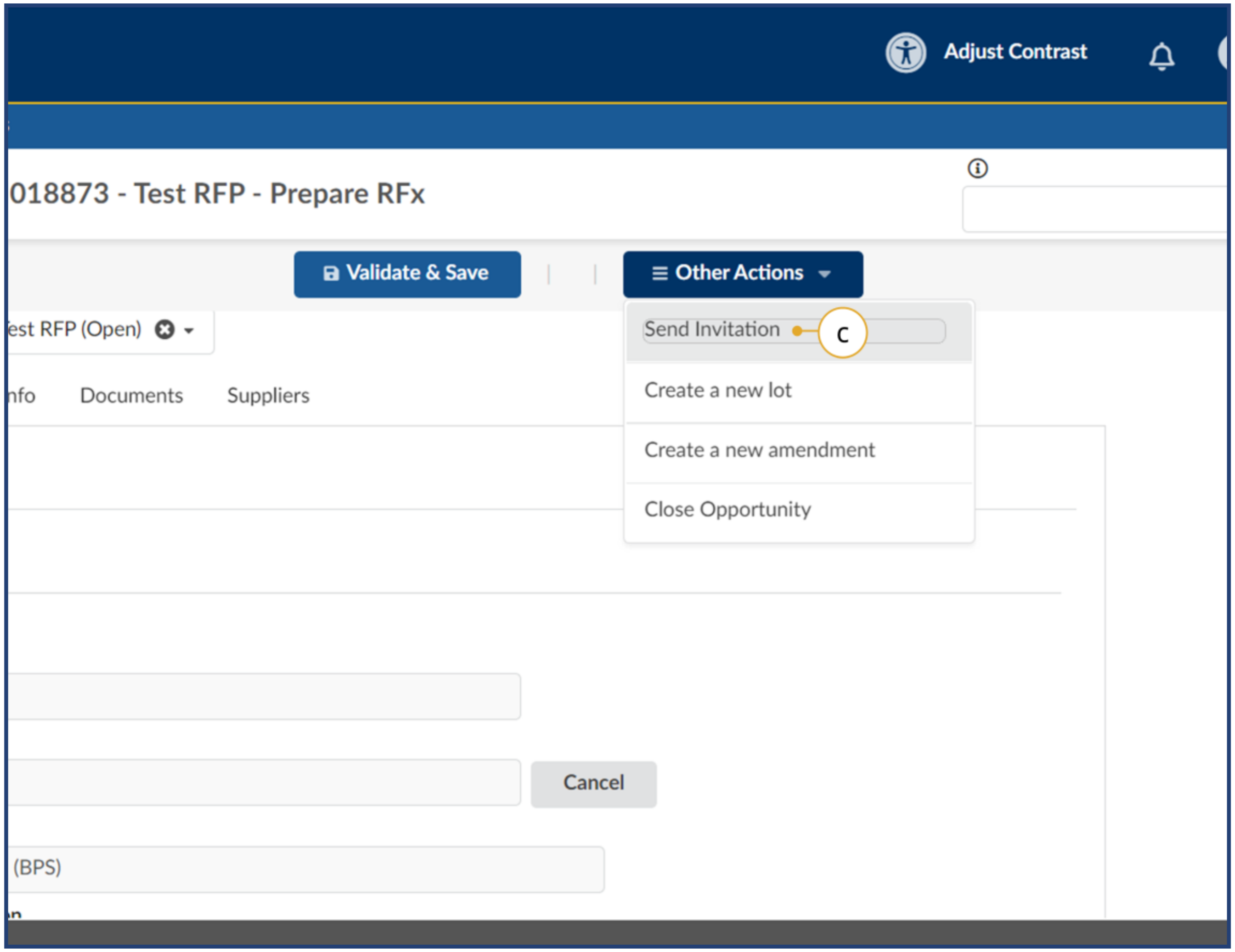
7. Click **OK**.


Step 2: this will allow suppliers to start their Submissions for this opportunity.
Do you want to open the opportunity for Submissions now? (Note that Cancel indicates that you do not want to open the opportunity now)
8
OK
Cancel
RFx Community Information Tool
4 Result(s)
Copy all team members
Email
Subject
BC Bid - {_BCBID_RFX_ID} - Opportunity NEW [or AMENDED << ...
Send me a copy
Dear {$contact_firstname} {$contact_lastname},
You are invited to review a new opportunity on BC Bid.
Issuing Organization(s): Ministry of Citizens' Services
Opportunity Description: Community Information Tool
Opportunity ID: 20600
Amendment #: 0
Closing Date and Time: 12/08/2021 2:00:00 PM PST
If you have any questions, please contact the Official Contact using the email shown below.
Regards,
Ben Rosche
Ben.Rosche@gov.bc.ca
[Page] [629 missing texts] [Update texts] [D] [$] [E] [No configuration context audit]
Approval
processed
[Site map] [Legal mentions]

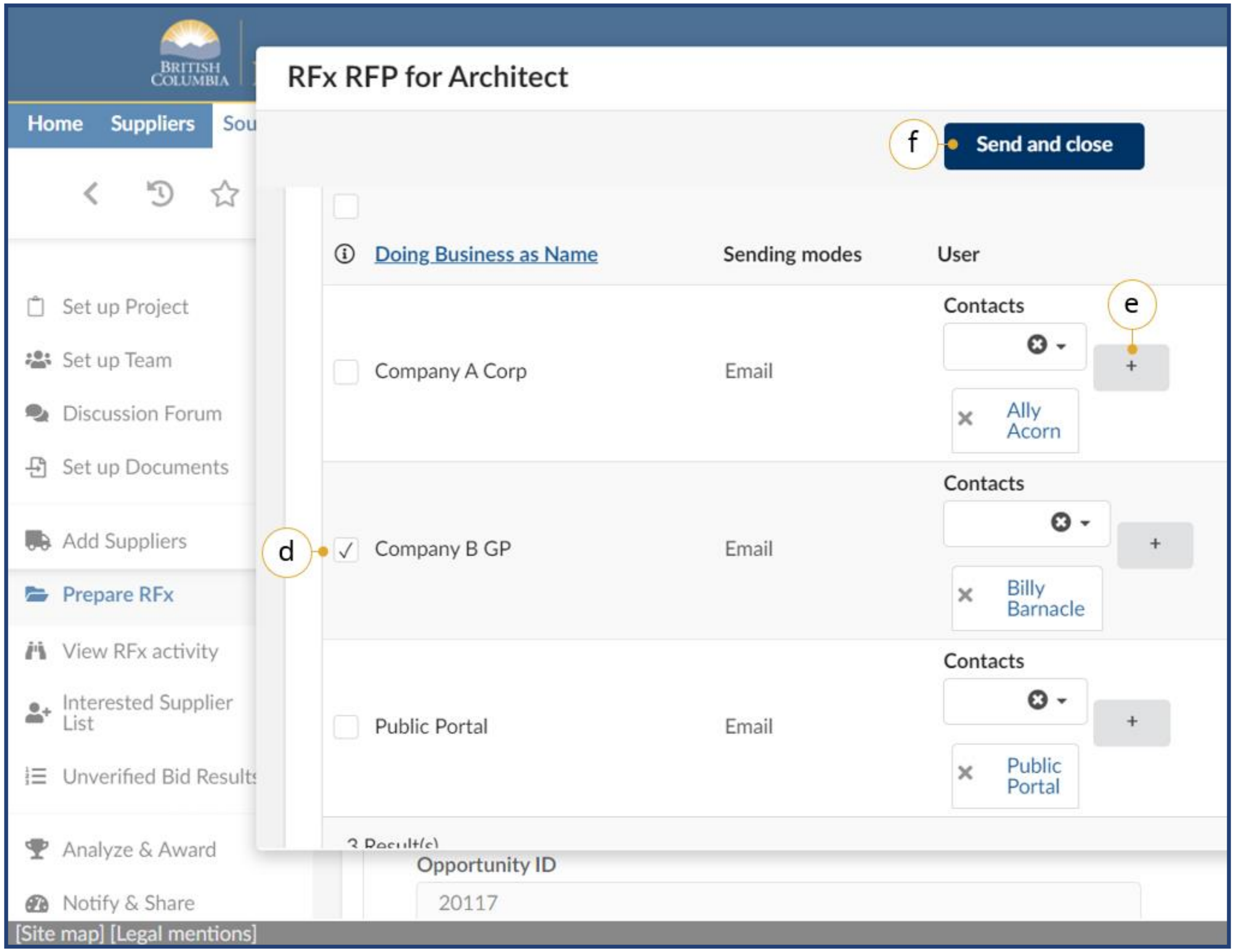
8. Click **OK**.

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**.

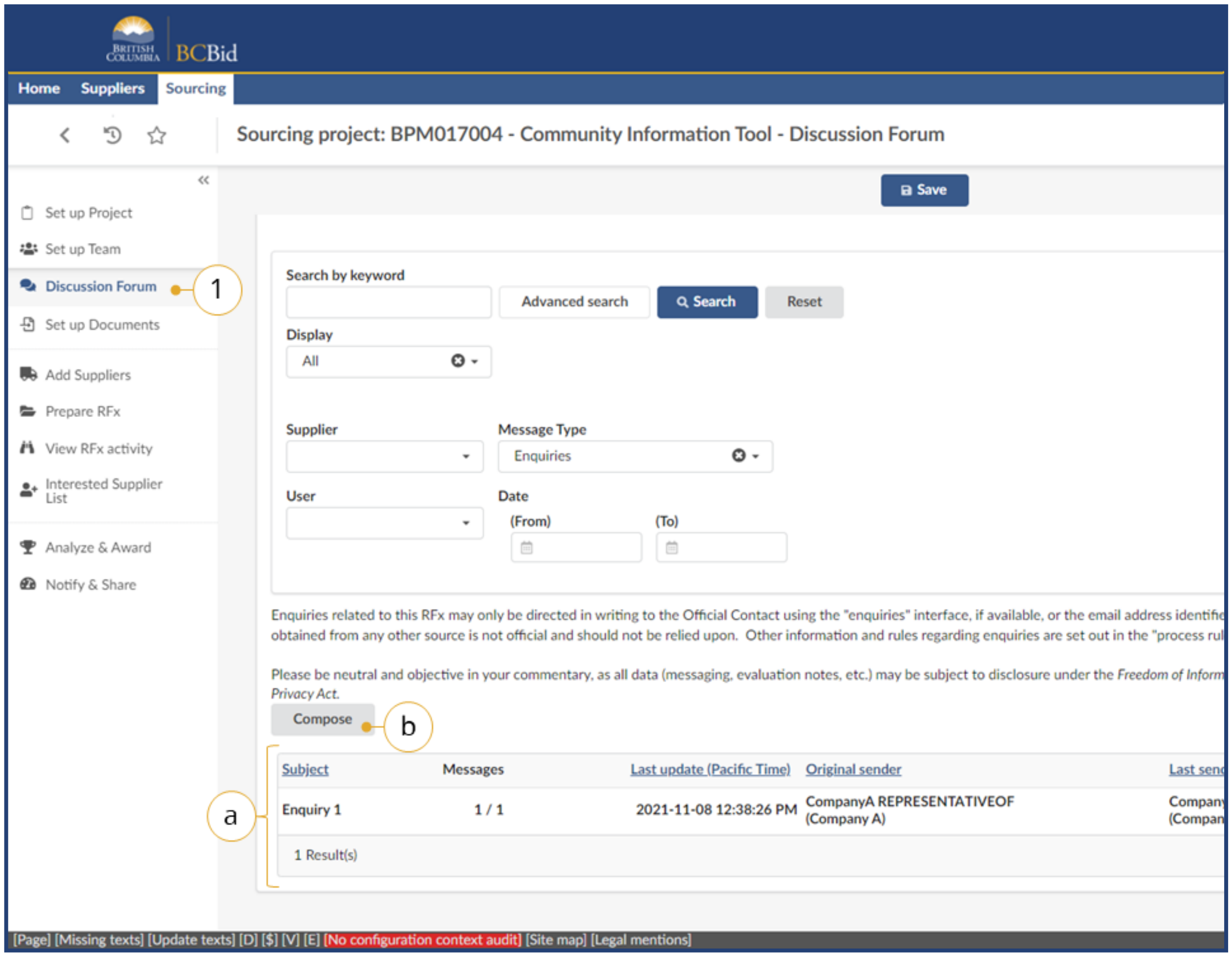


d. In the dialog box, select the new Supplier.
e. *Optional*: Click the **+** button to add a contact to the Supplier profile.
f. Click **Send and close**.

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

Creating an Addendum

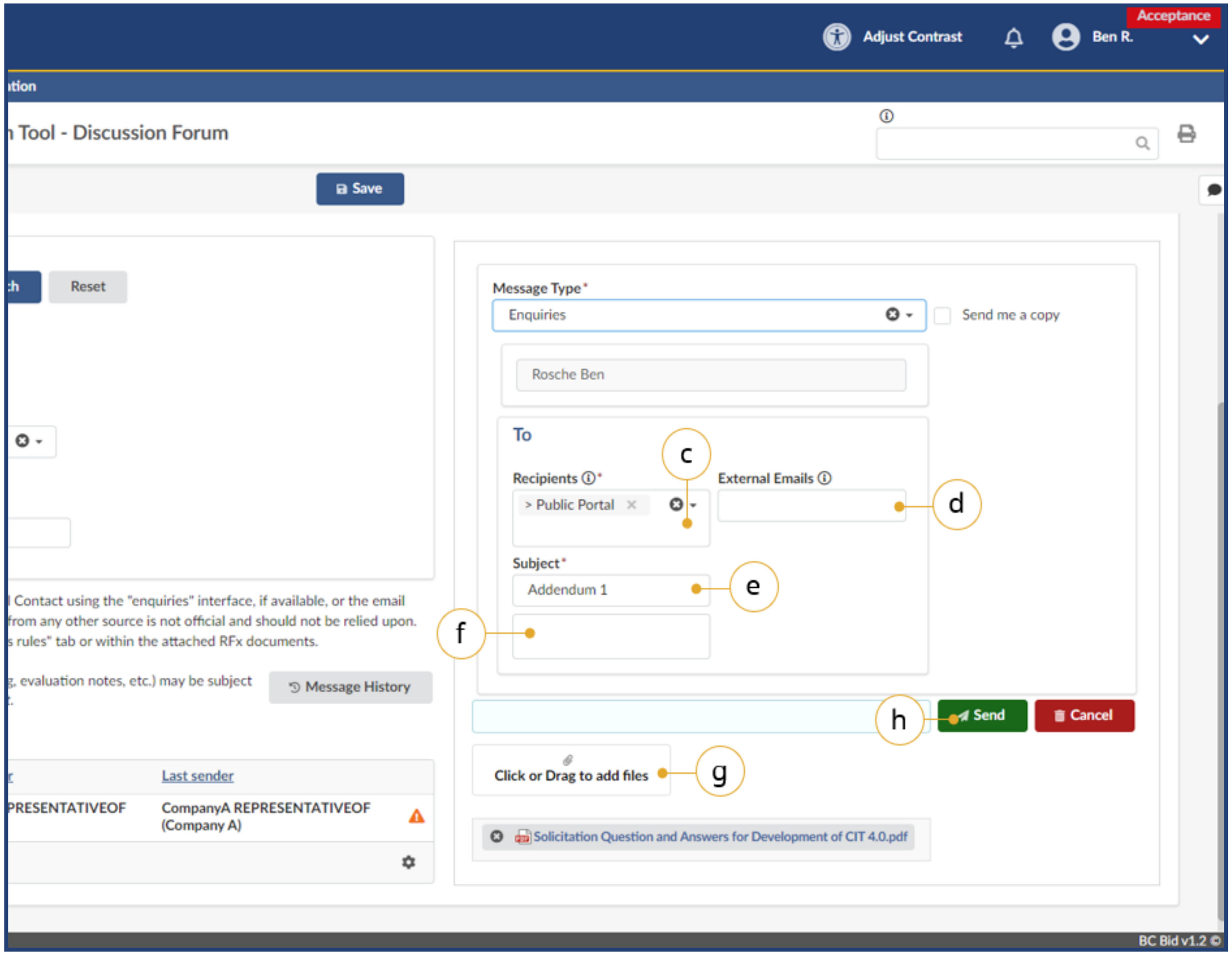
An Addendum is created in the Discussion Forum to make minor changes or clarifications to an opportunity. Items that are changed via addendum could be: clarification on a requirement, responding to a Supplier question, and providing additional information with an additional document. Creating an addendum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



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.

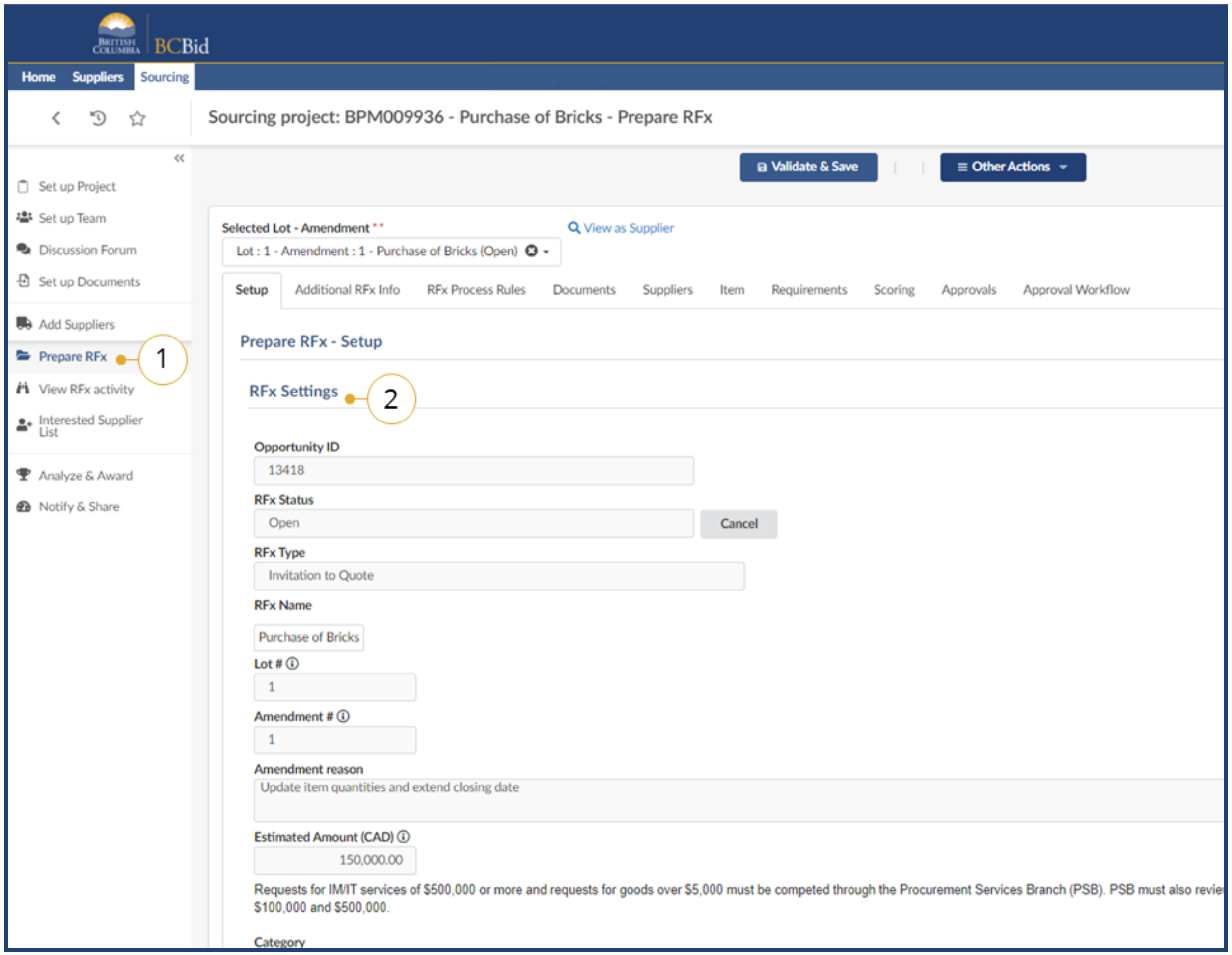


c. In the **Recipients** drop-down list, select **Public Portal** for publicly posted opportunities, or **All Invited Suppliers** for opportunities that are limited to specific suppliers. For the addenda to be visible to all team members, also add **All Internal Team Members**.
d. *Optional*: In the **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.

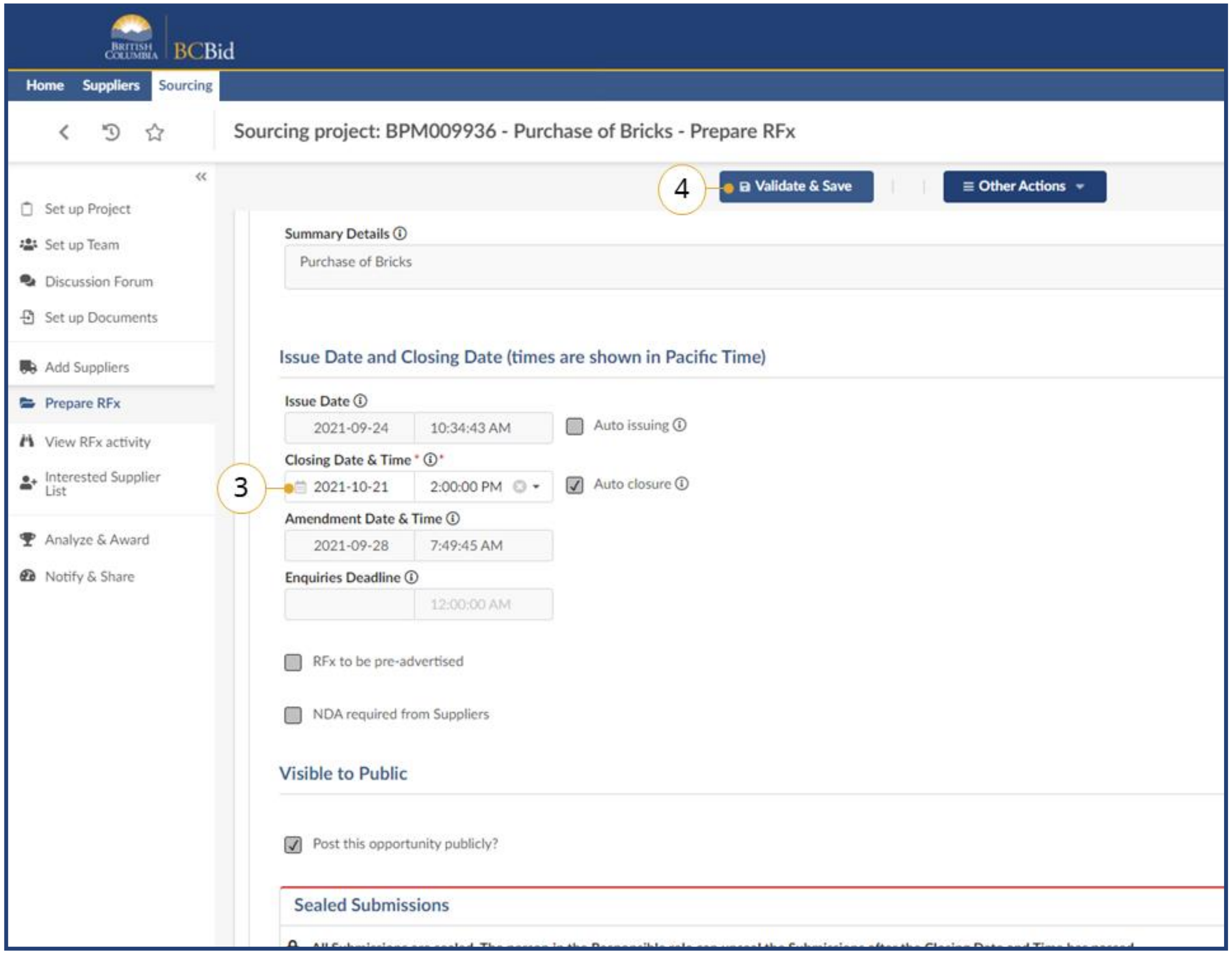
Suppliers will receive notification on an addendum if they have selected the **Start Submission** button and the message is sent to **All Invited Suppliers**.

Changes to Closing Date

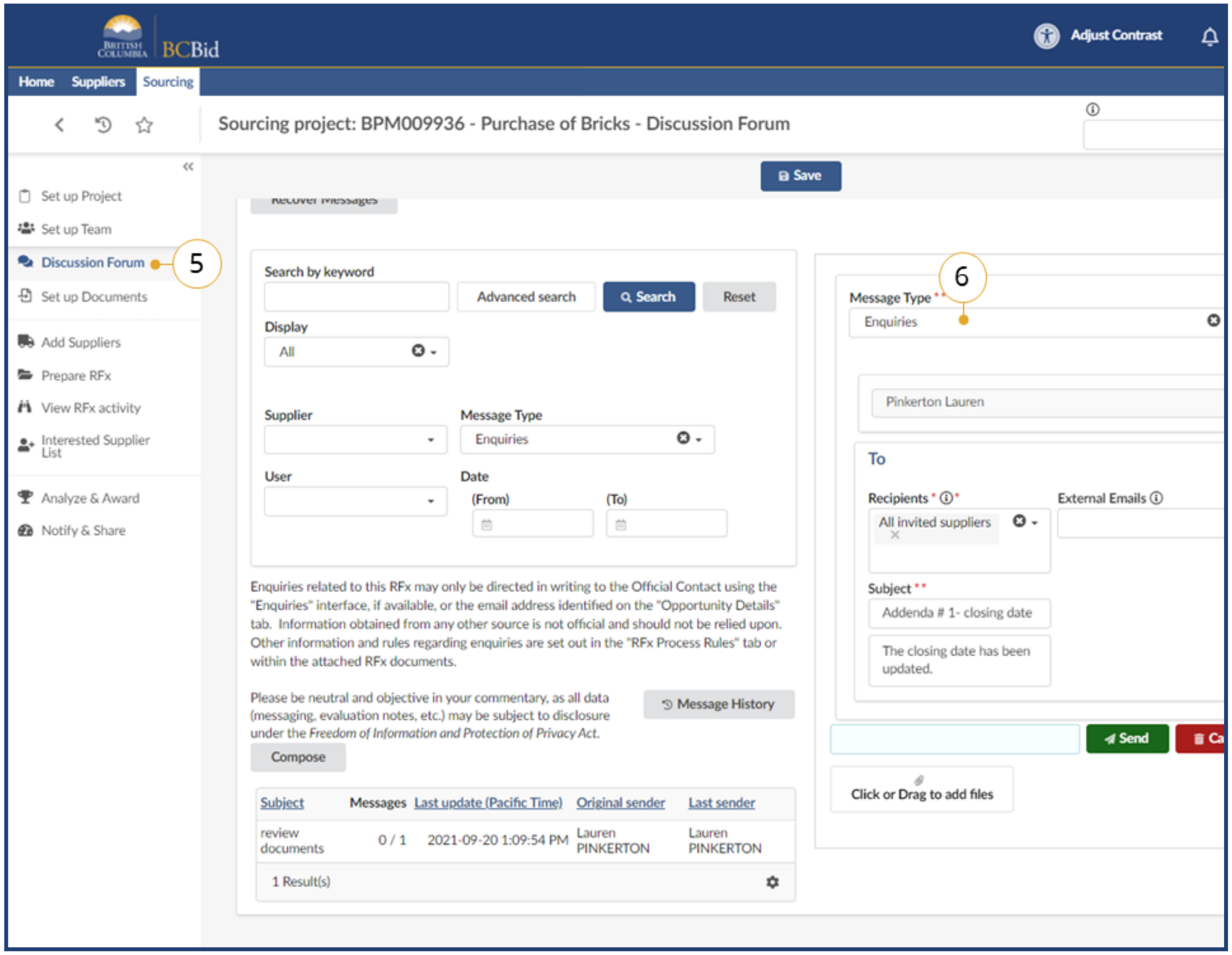
Changes to the Closing Date must have an Addendum processed at the same time as a method to notify suppliers of the change. They do not require an Amendment.



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



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.**

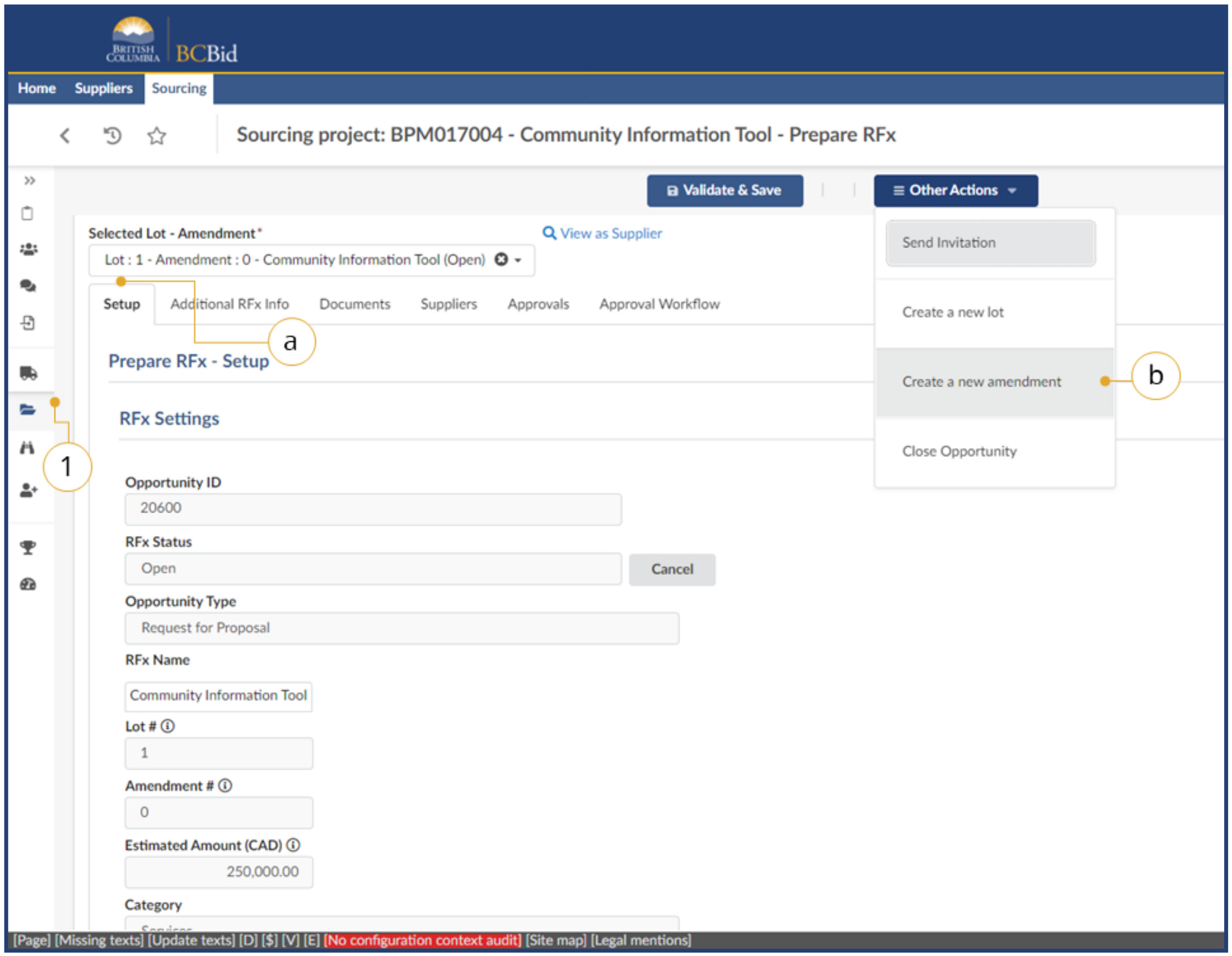


5. On the left-hand menu, click **Discussion Forum**.
6. Proceed with creating an addendum to notify suppliers of the change in closing date. See Addendum section for more information.

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

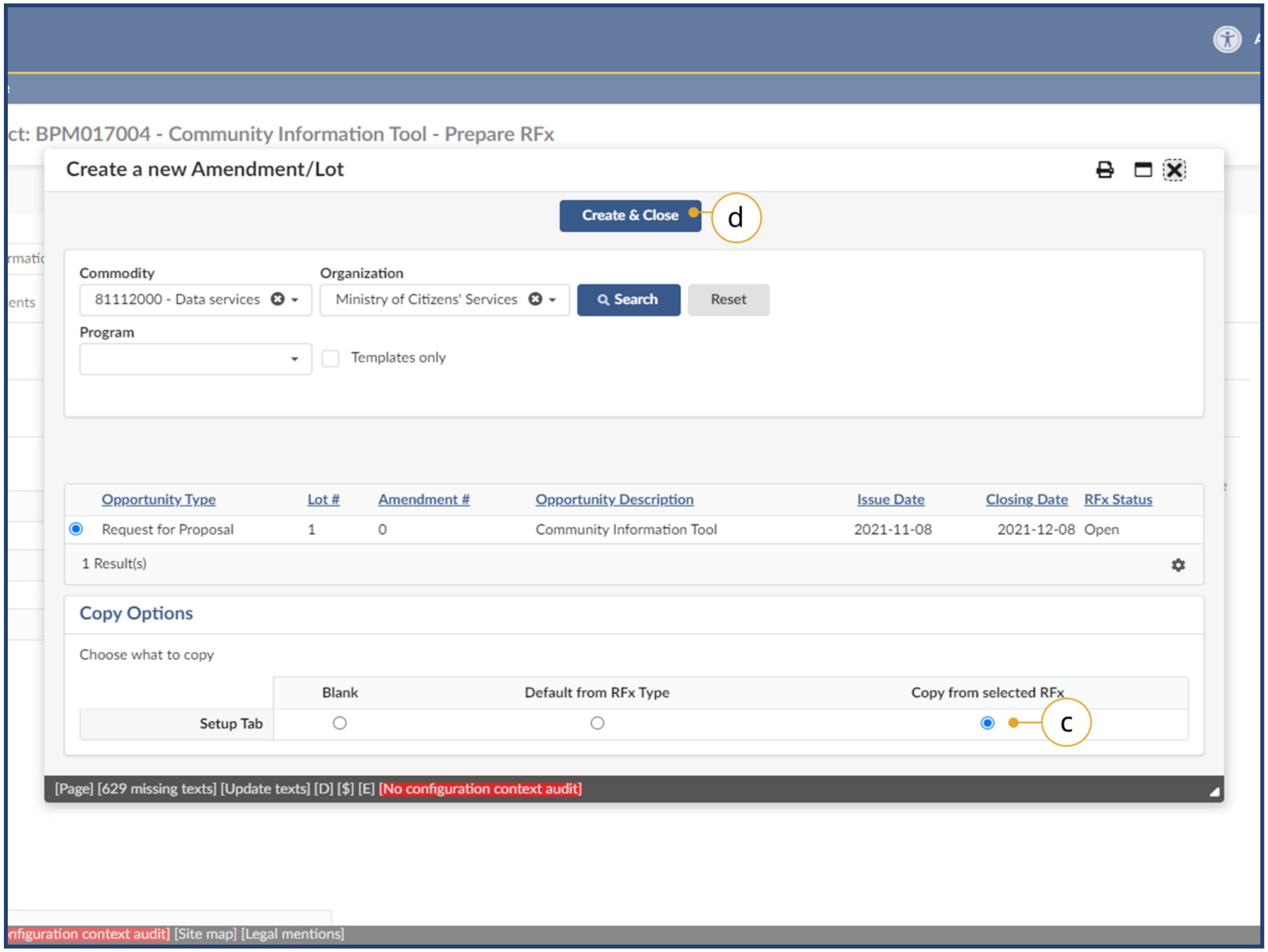
Creating an Amendment

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.



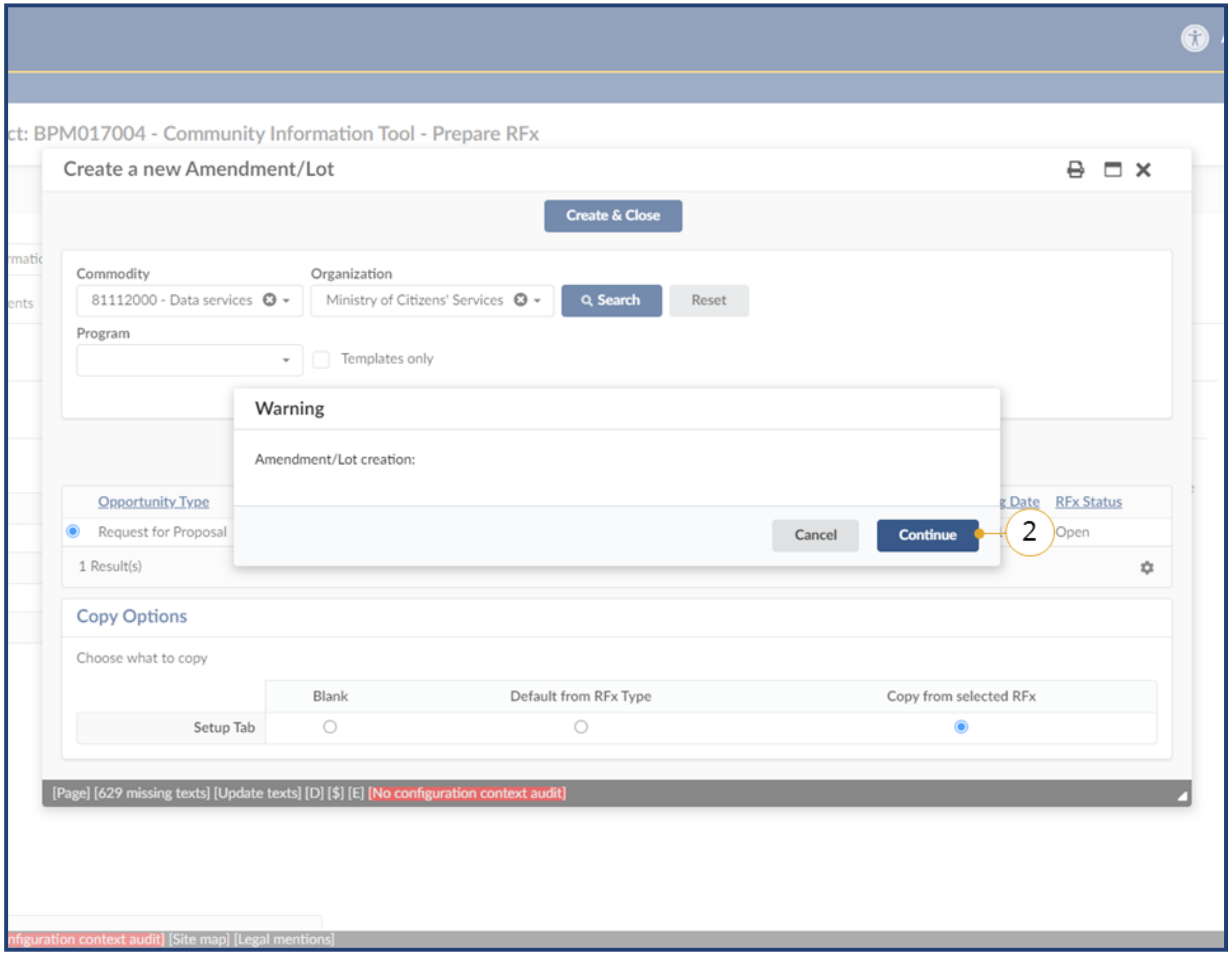
1. In the left-hand menu, click **Prepare RFx**.
   a. Navigate to the **Setup** tab.
   b. From the **Other Actions** drop-down list select **Create a new amendment.**

[Issuing an Amendment]



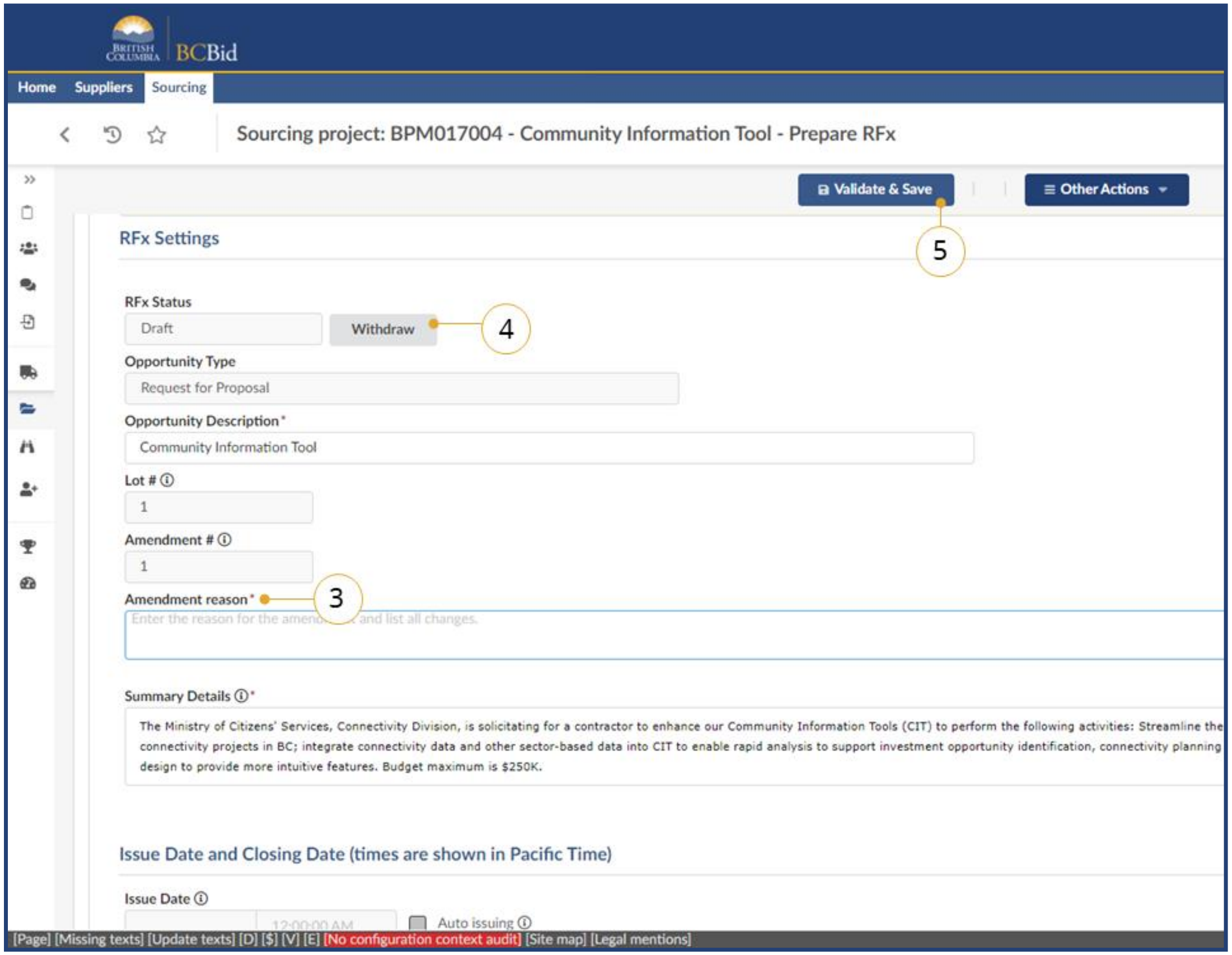
c. In the **Create a new Amendment/Lot** window, select **Copy from selected RFx**.
d. Click **Create & Close**.

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



2. Click **Continue**.

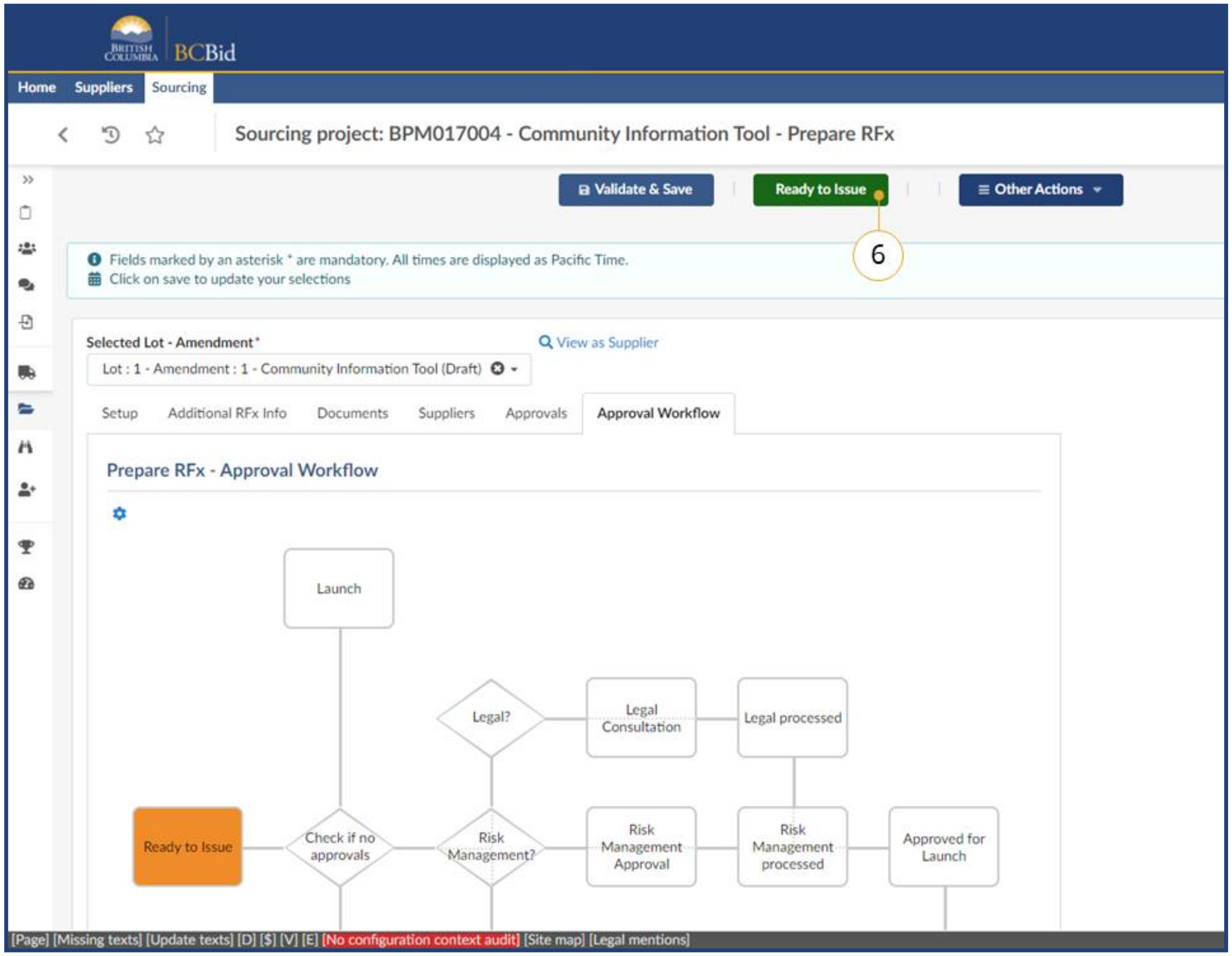
Creating an amendment will cause any Submissions already received to be rejected, requiring vendors to resubmit their response. Submission submitted on previous amendment versions will not be able to be evaluated.



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**.

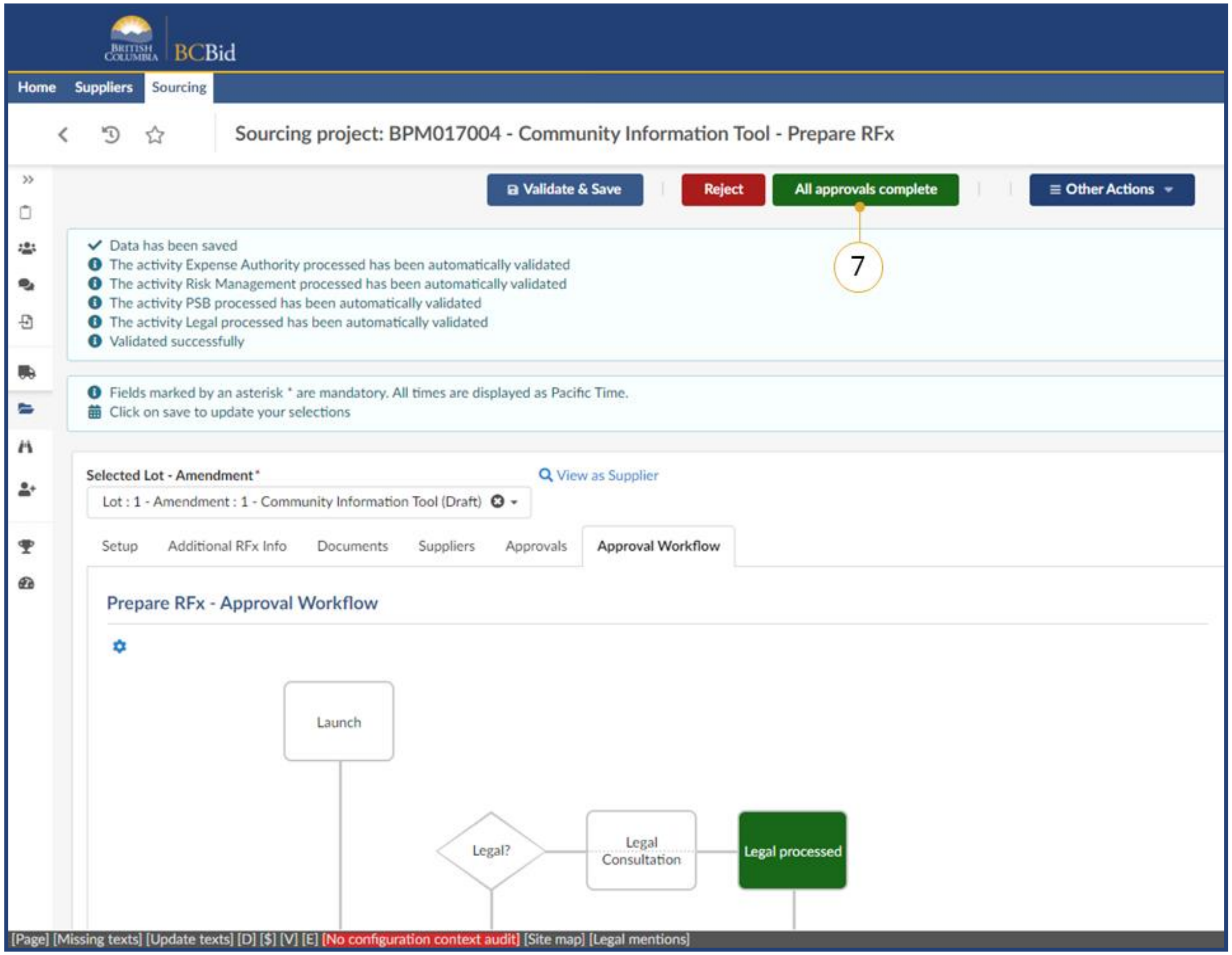
Do not change the Opportunity ID with an Amendment.

Posting an Amendment

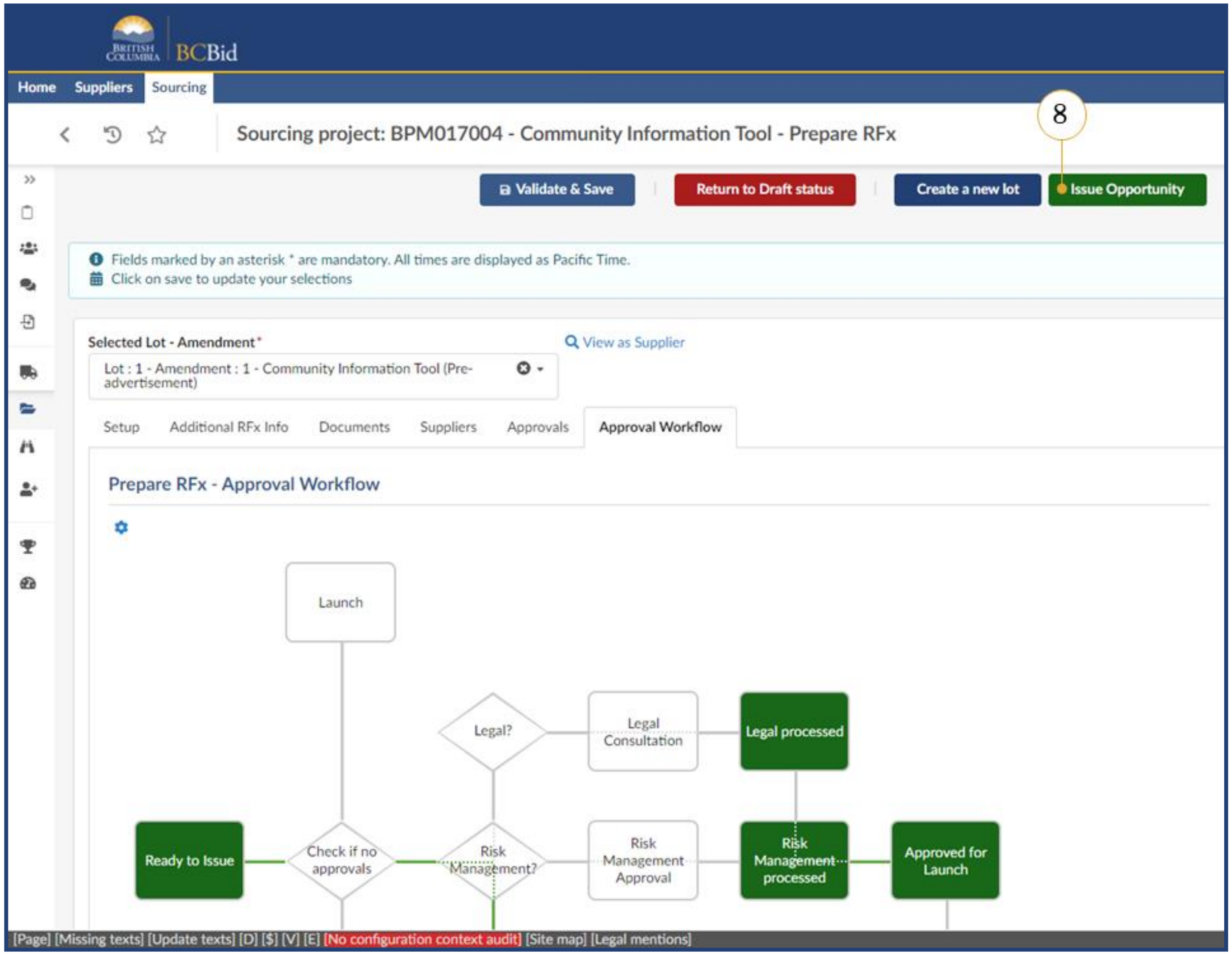


5. Click **Ready to Issue**.

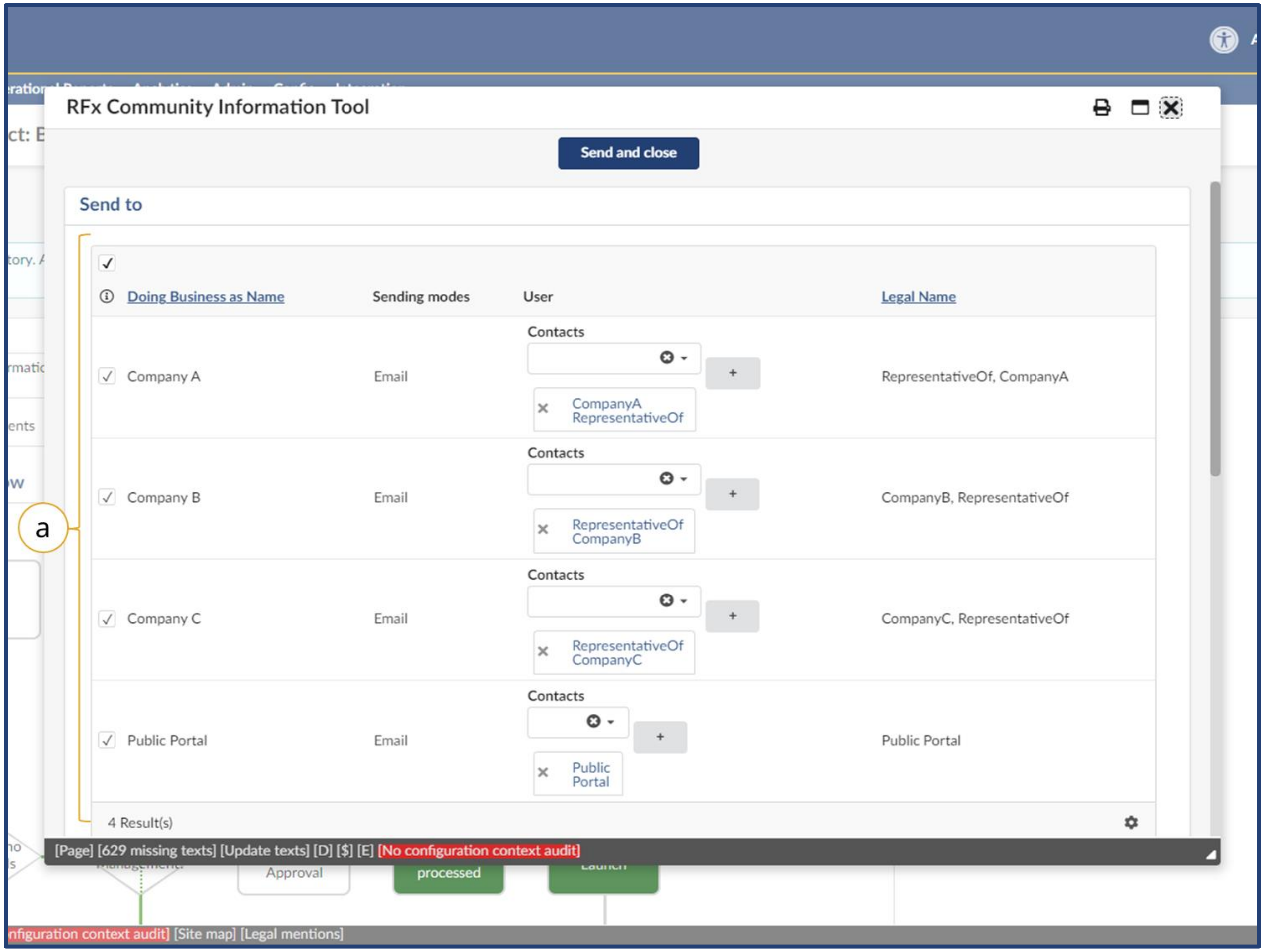
If the Buyer wants to delete the Lot or Amendment they can do so prior to issuing using the **Other Actions** dropdown button.



6. Select **All approvals complete**.

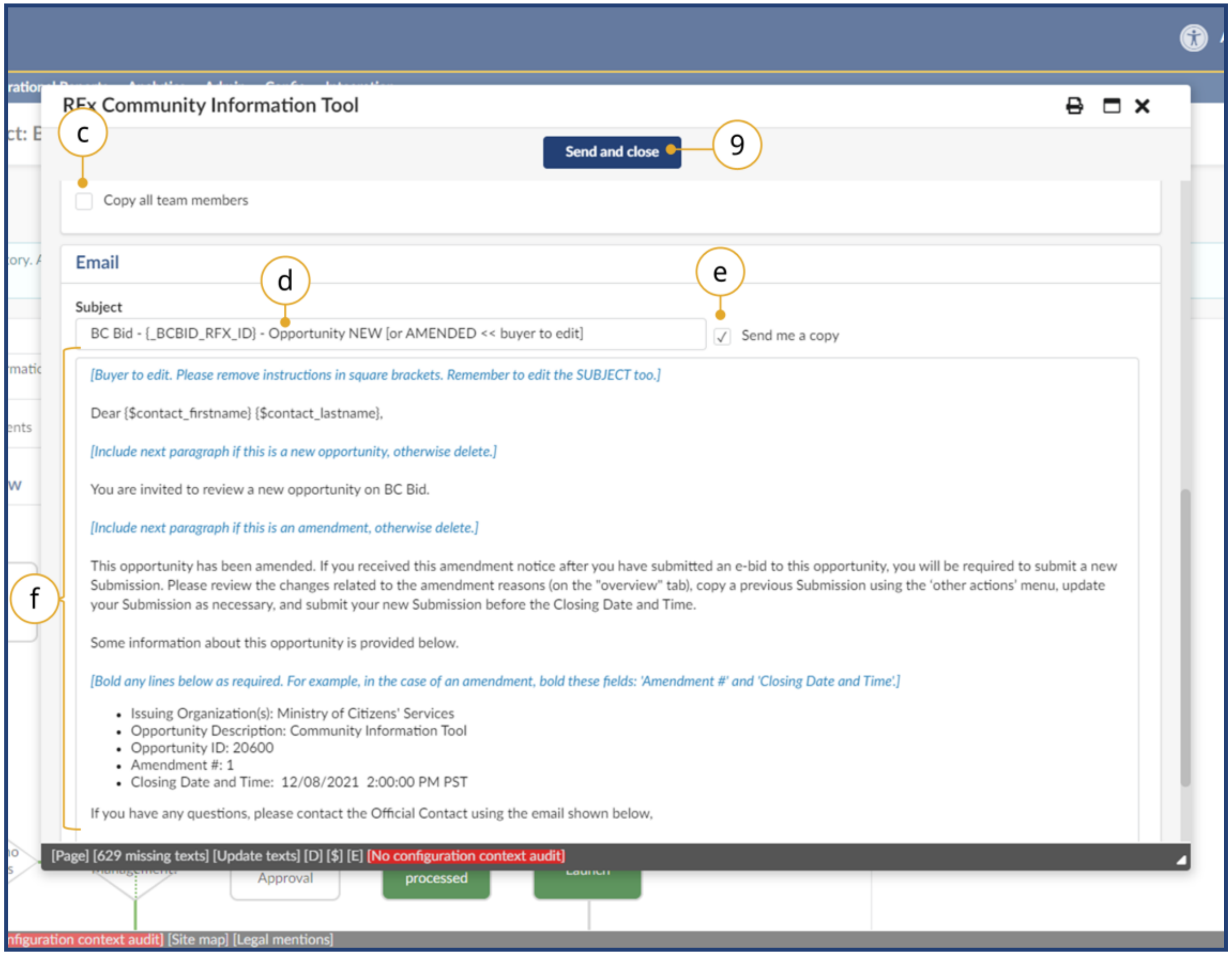


7. Click **Issue Opportunity**.



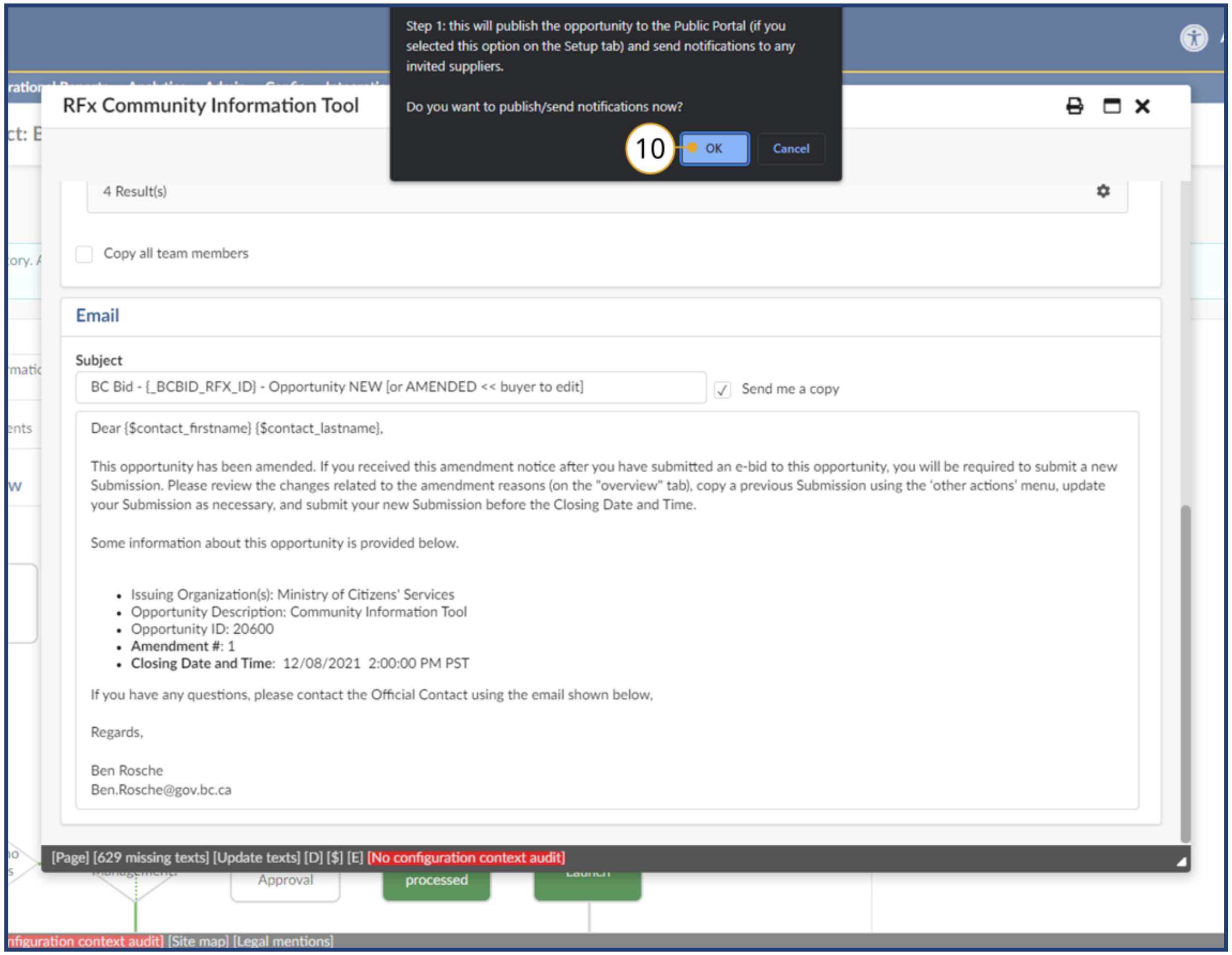
a. Suppliers listed will receive email notifications of the amendment.

Suppliers are listed if they were invited to the opportunity or if they clicked the **Start Submission** button in the Supplier Dashboard.

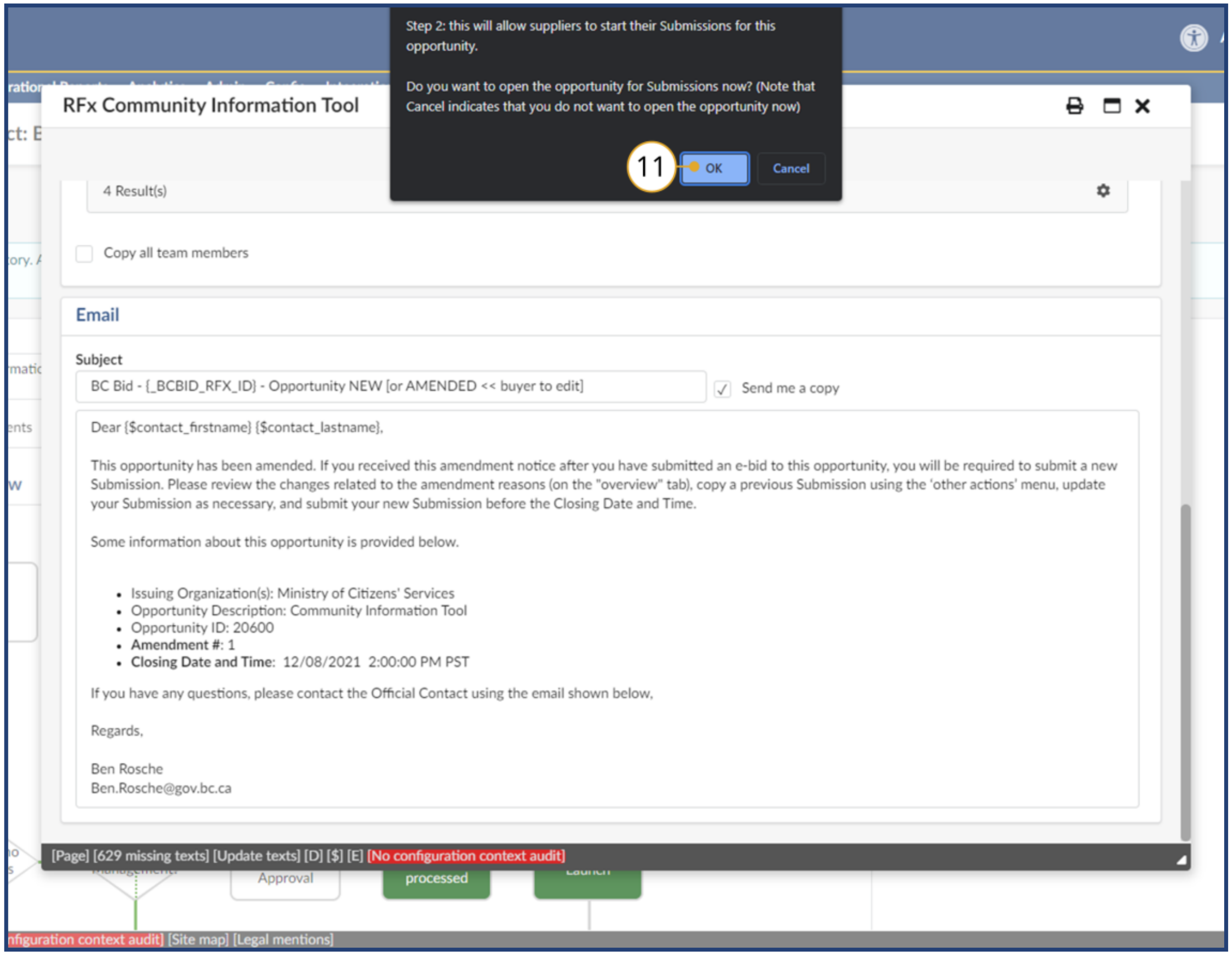


   b. *Optional:* Click the **Copy all team members** checkbox to send the invitation to all team members.
   c. *Optional:* In the **Subject** textbox, review the subject name.
   d. *Optional*: Click the **Send me a copy** checkbox to receive a copy of the invitation.
   e. Review the email and make edits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

8. Select **Send and close**.

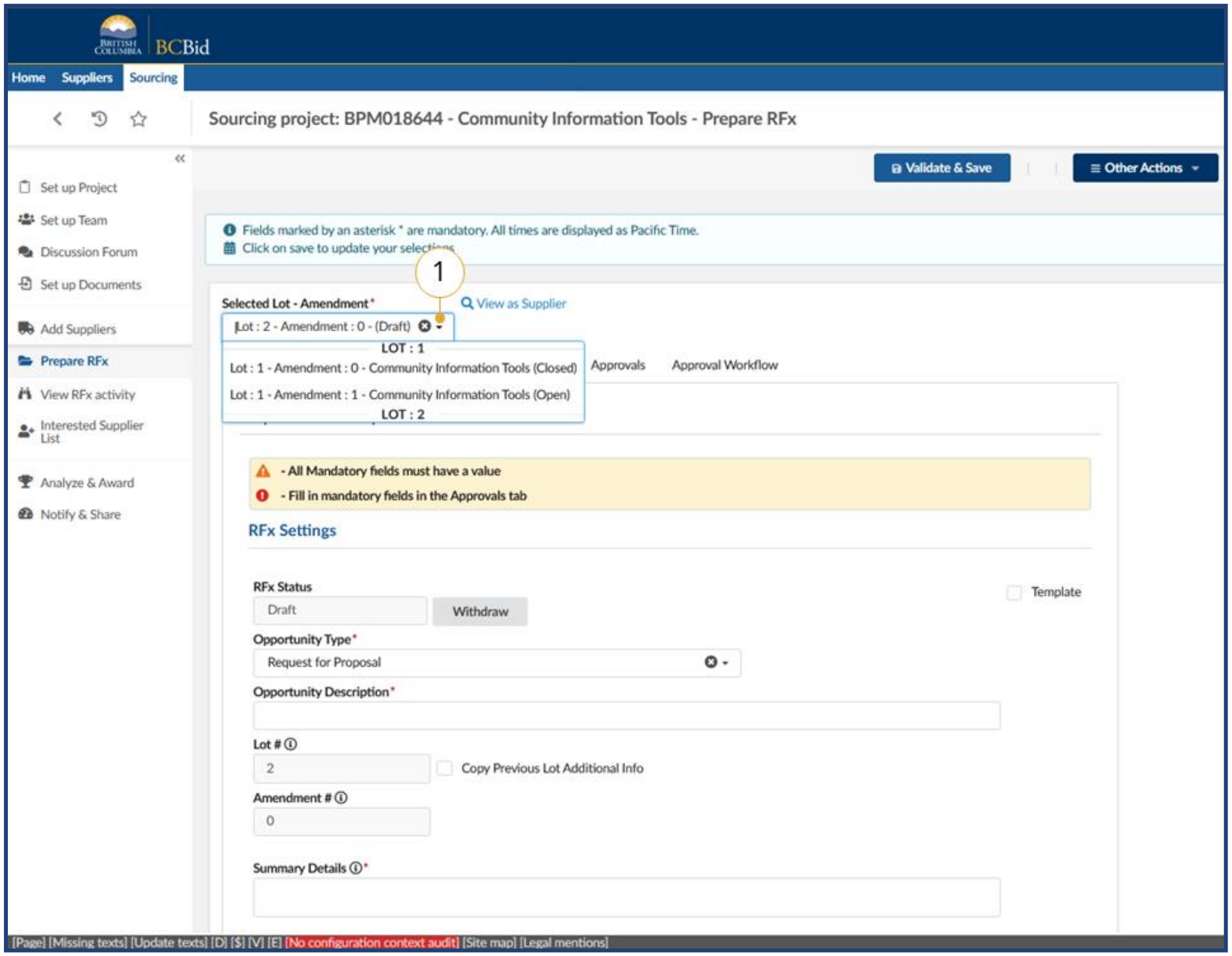

Step 1: this will publish the opportunity to the Public Portal (if you selected this option on the Setup tab) and send notifications to any invited suppliers.
Do you want to publish/send notifications now?
10
OK
Cancel
RFx Community Information Tool
4 Result(s)
Copy all team members
Email
Subject
BC Bid - {_BCBID_RFX_ID} - Opportunity NEW [or AMENDED << buyer to edit]
Send me a copy
Dear {$contact_firstname} {$contact_lastname},
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.
Issuing Organization(s): Ministry of Citizens' Services
Opportunity Description: Community Information Tool
Opportunity ID: 20600
Amendment #: 1
Closing Date and Time: 12/08/2021 2:00:00 PM PST
If you have any questions, please contact the Official Contact using the email shown below,
Regards,
Ben Rosche
Ben.Rosche@gov.bc.ca
[Page] [629 missing texts] [Update texts] [D] [$] [E] [No configuration context audit]
Approval
processed
[Site map] [Legal mentions]

9. Click **OK**.


Step 2: this will allow suppliers to start their Submissions for this opportunity.
Do you want to open the opportunity for Submissions now? (Note that Cancel indicates that you do not want to open the opportunity now)
11
OK
Cancel
RFx Community Information Tool
4 Result(s)
Copy all team members
Email
Subject
BC Bid - [_BCBID_RFX_ID] - Opportunity NEW [or AMENDED << buyer to edit]
Send me a copy
Dear {$contact_firstname} {$contact_lastname},
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.
Issuing Organization(s): Ministry of Citizens' Services
Opportunity Description: Community Information Tool
Opportunity ID: 20600
Amendment #: 1
Closing Date and Time: 12/08/2021 2:00:00 PM PST
If you have any questions, please contact the Official Contact using the email shown below,
Regards,
Ben Rosche
Ben.Rosche@gov.bc.ca
[Page] [629 missing texts] [Update texts] [D] [$] [E] [No configuration context audit]
Approval
processed
[Site map] [Legal mentions]

10. Click **OK**.

Toggle Amendment or Lot



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.

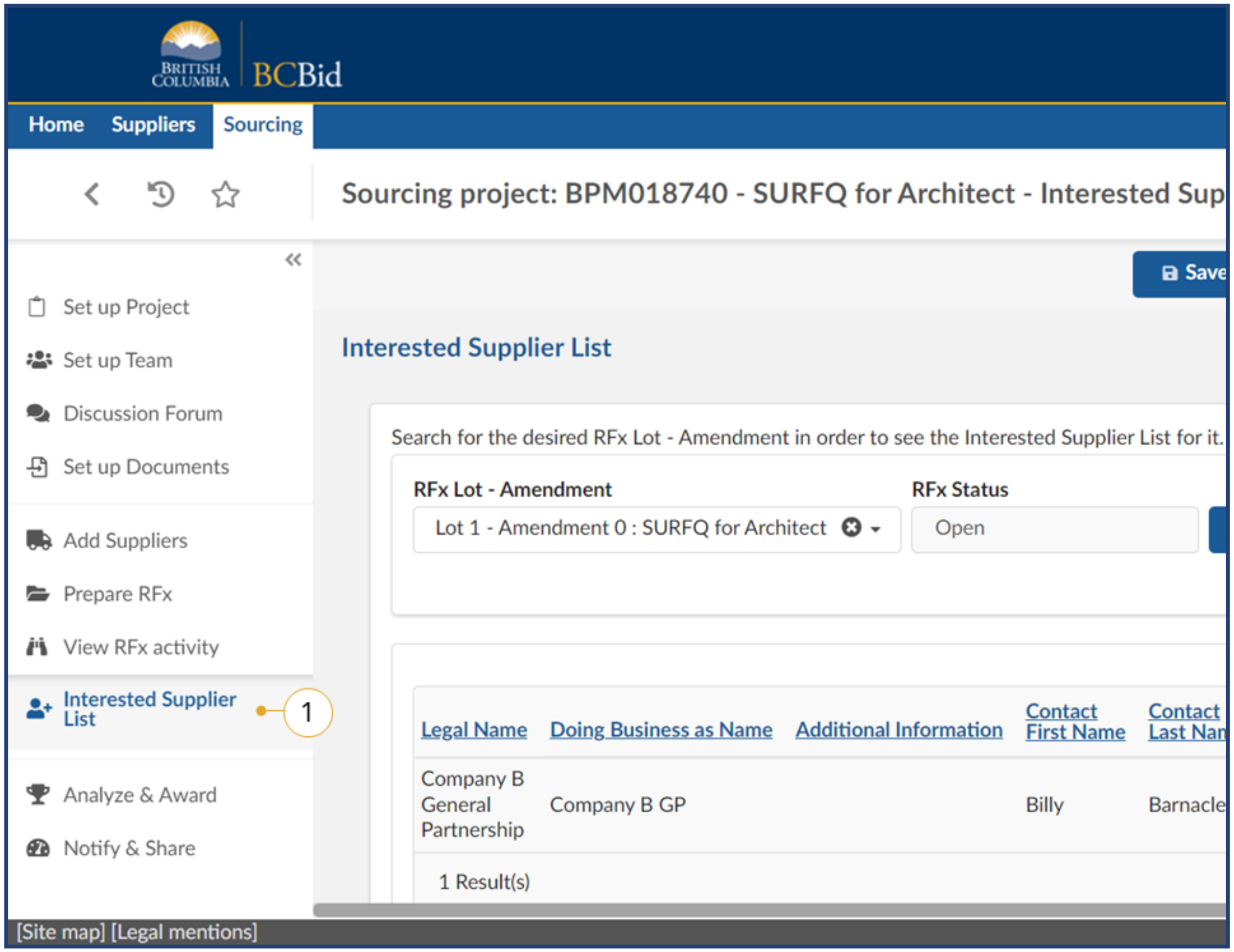
Amending a Qualified Supplier List Generating Opportunity

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.

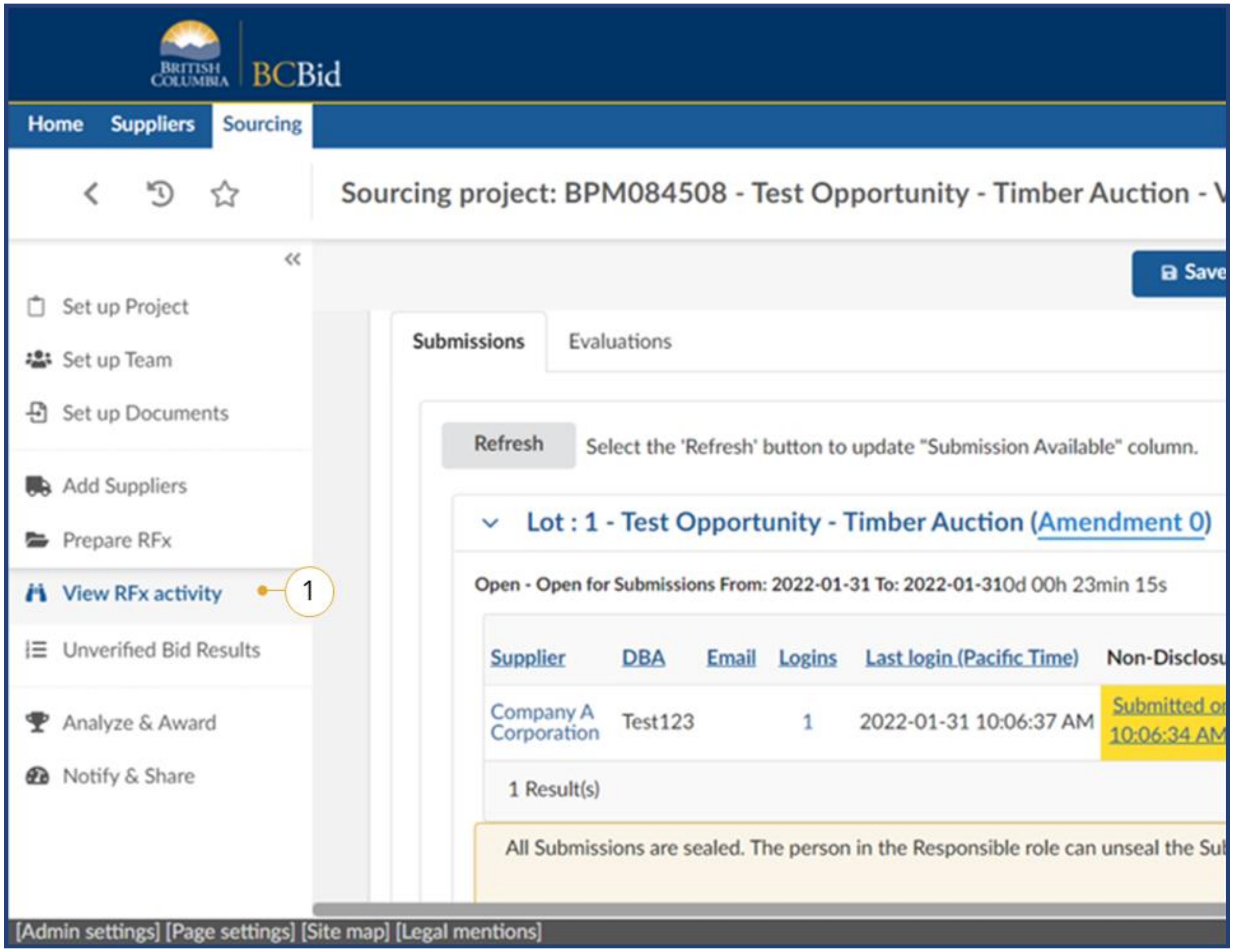
Interested Supplier List



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.

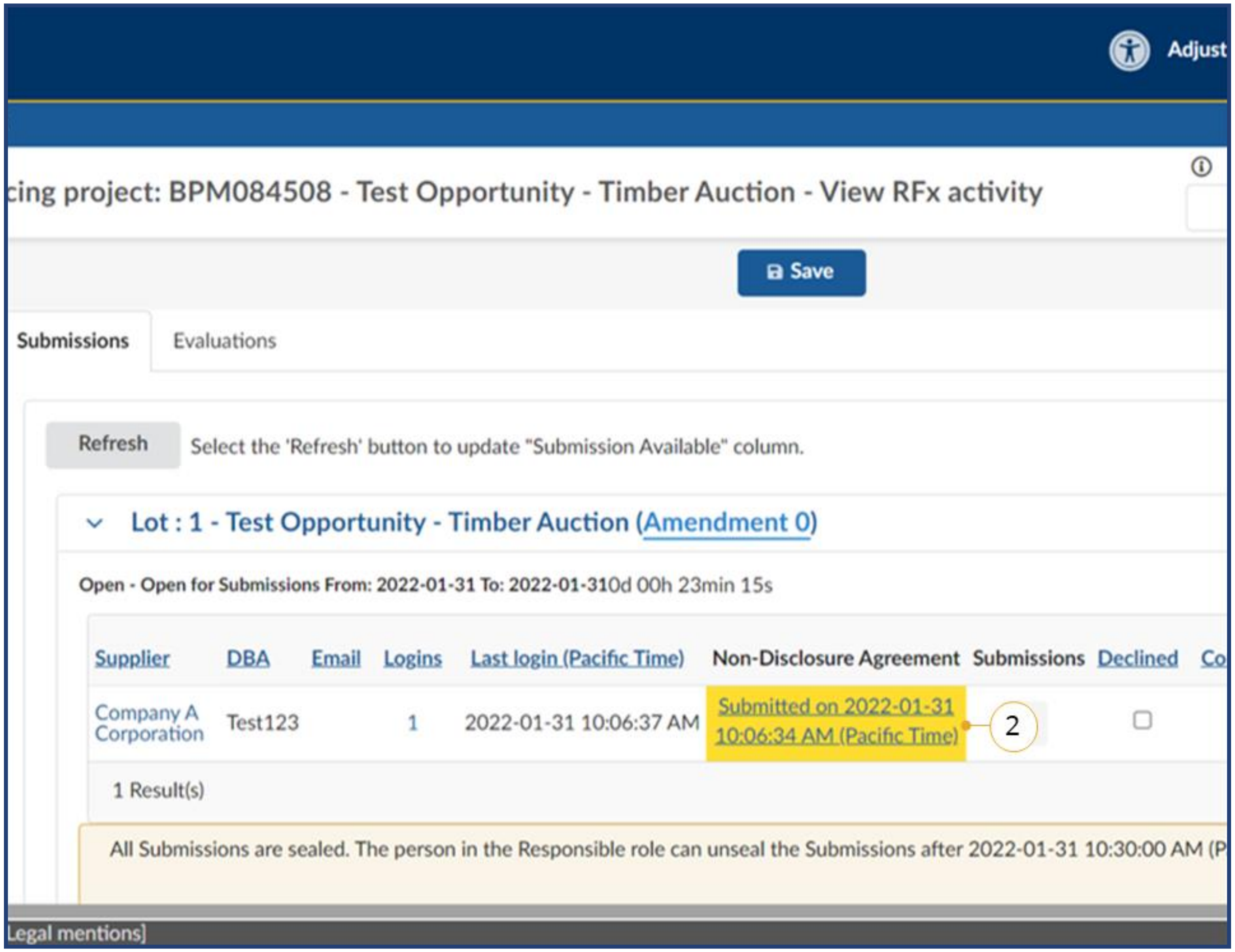
   Note: This step is applicable only if the publicly available Interested Supplier List used for this RFx checkbox was checked in the Setup tab.

Review NDA



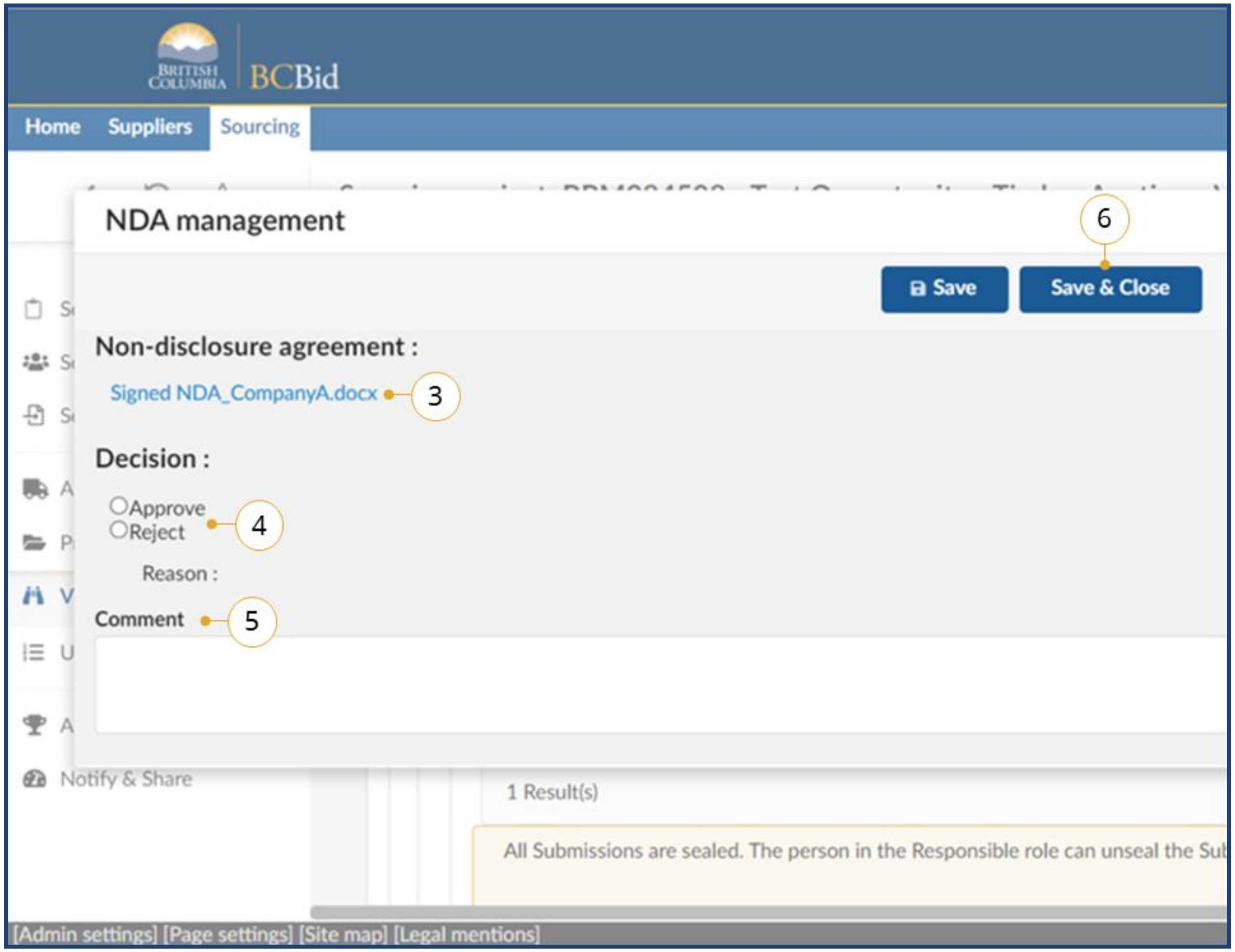
1. In the left-hand menu, click **View RFx activity**.

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



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

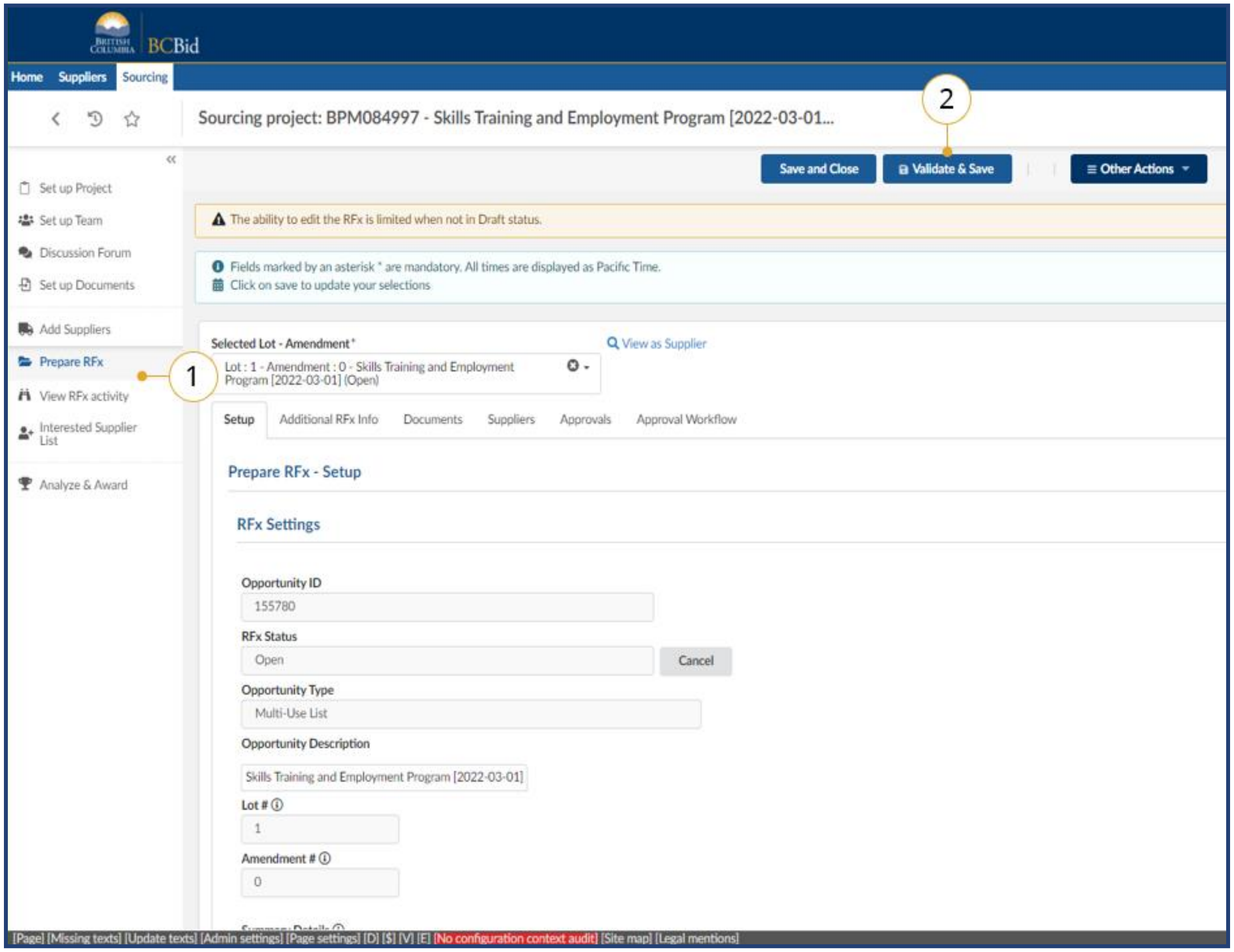
If the Non- Disclosure Agreement column is not visible, select the Cog icon in the lower right corner of the table. Once selected, the user can change which columns are visible.



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.

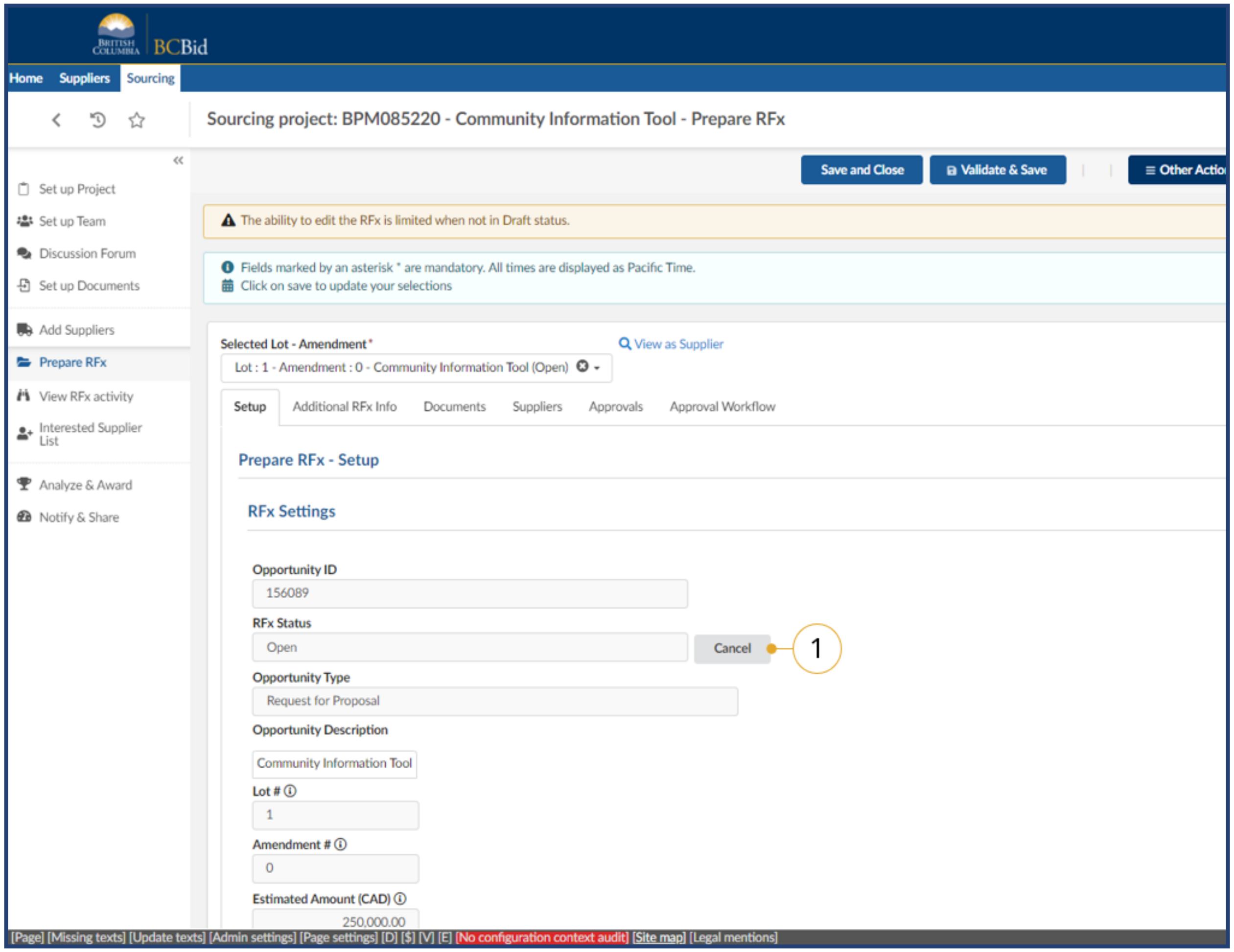


1. After adding the Supplier on the add Supplier tab, navigate to the **Prepare RFx – Setup** tab.
2. Click the **Validate & Save** button.
3. Complete the steps identified in the [Upload Submissions]().

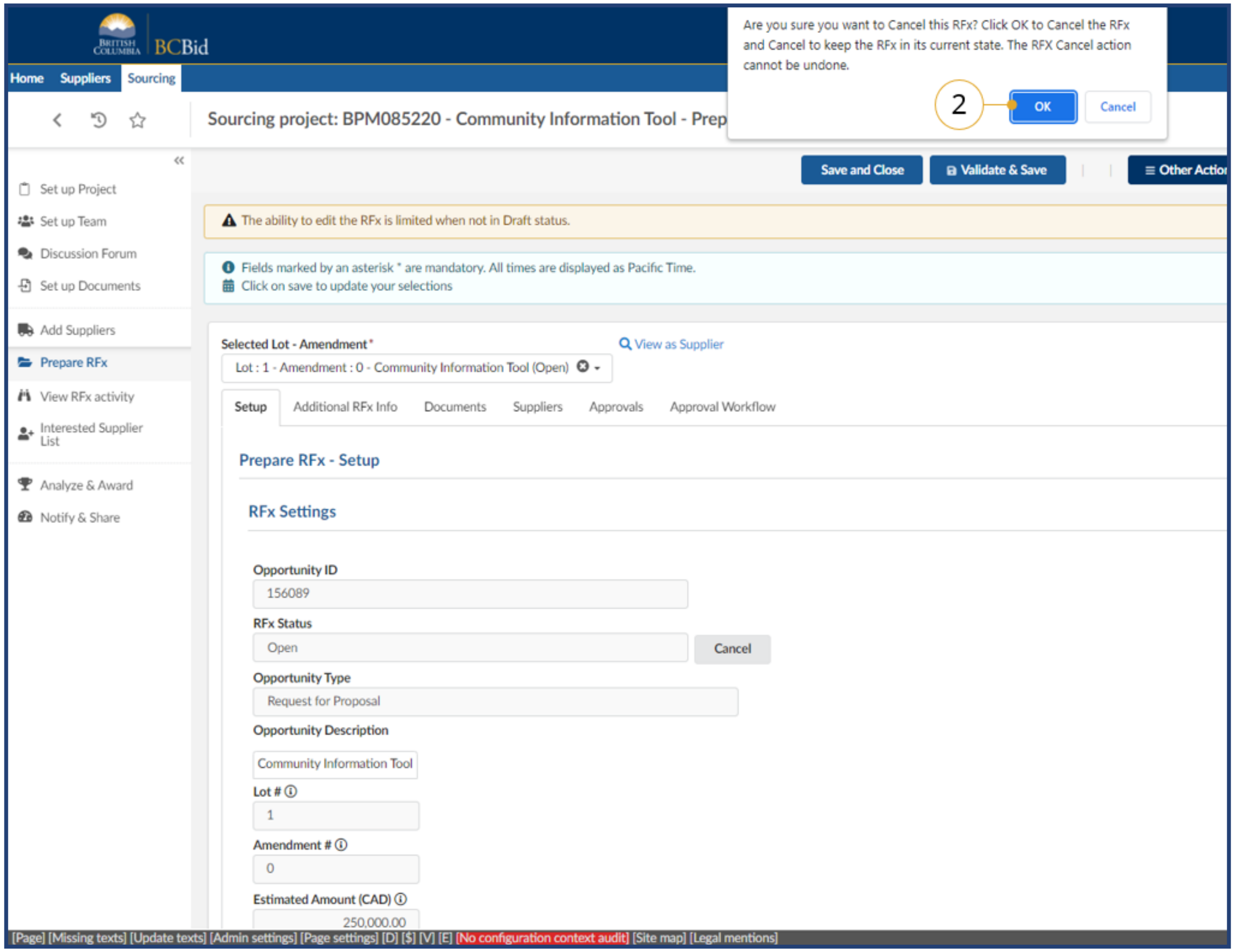
Note: If the Validate & Save button is not selected "NA" will appear on the View RFx activity.

[Upload Submissions for Open Opportunities]()

Cancel an Issued Opportunity



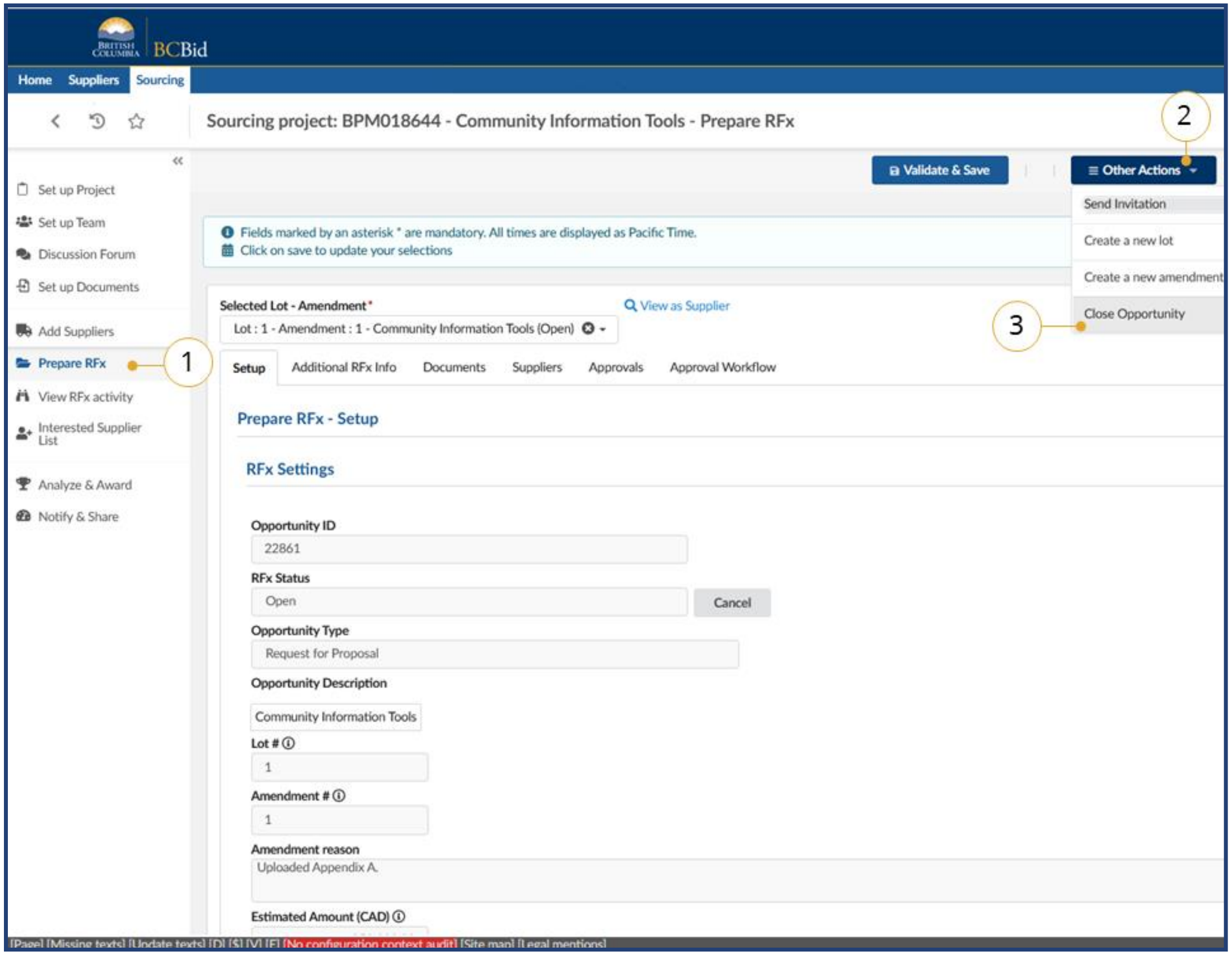
1. On the Prepare RFx – Setup tab click the **Cancel** button.



2. Click the **OK**.

Step 5 – Opportunity Close

Manual Close of Opportunity

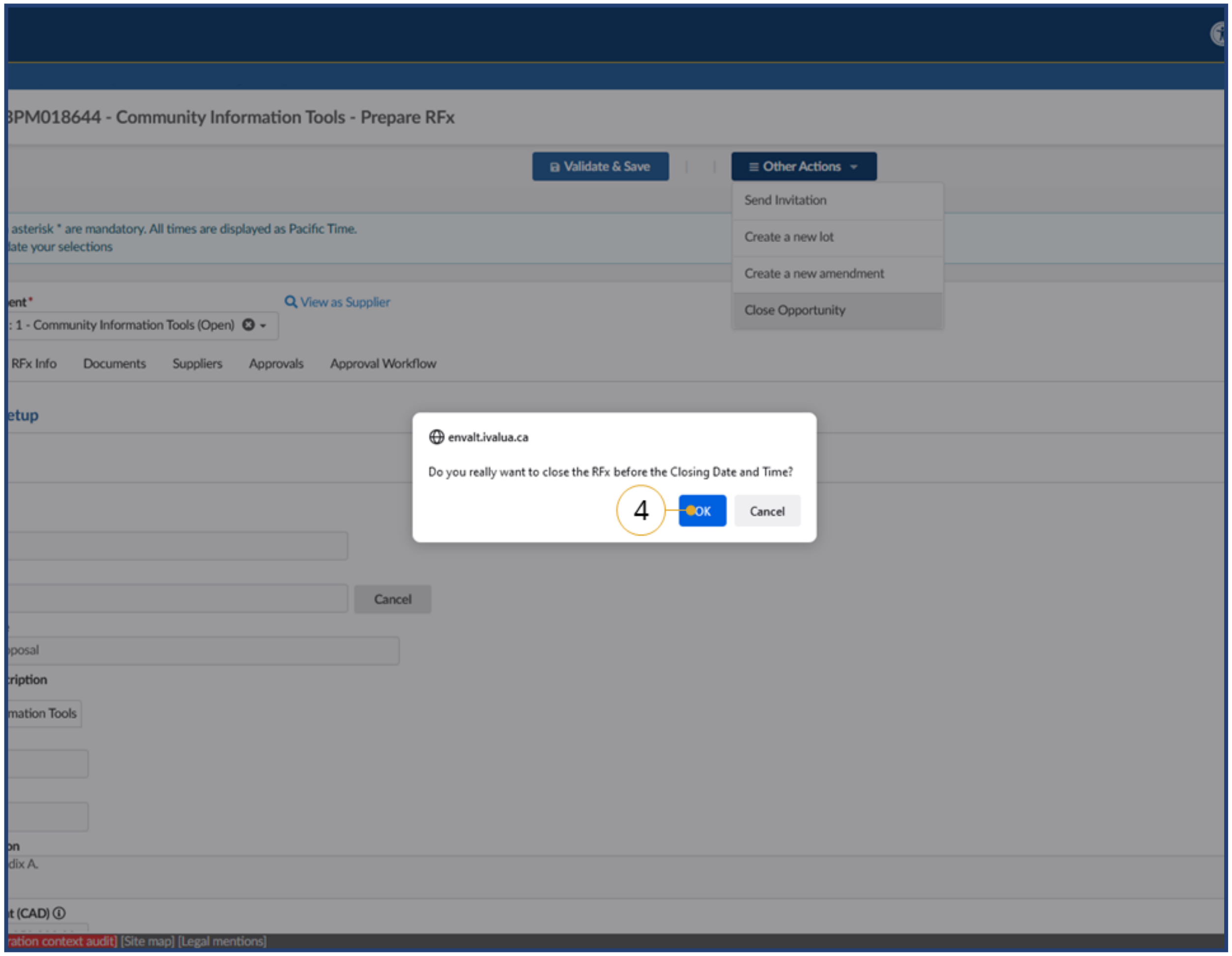


1. In the left-hand menu, click **Prepare RFx**.
2. Click the **Other Actions** dropdown button.
3. Click **Close Opportunity**.

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

[Manually Close a Posted Opportunity]

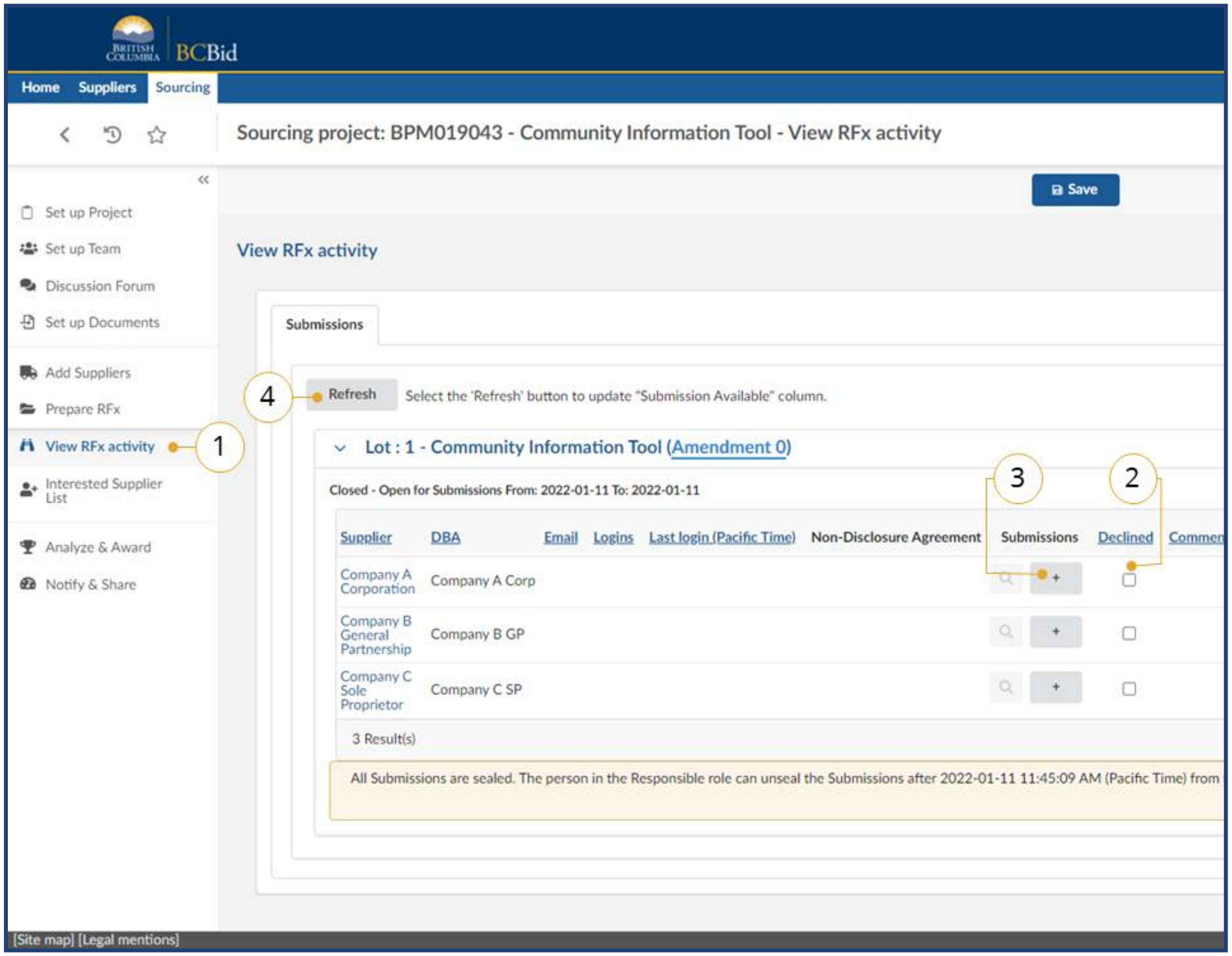
Manual closure of opportunities is available and should be used in accordance with core policy and best practices. This function is not recommended for use.


3PM018644 - Community Information Tools - Prepare RFx
Validate & Save
Other Actions
Send Invitation
Create a new lot
Create a new amendment
Close Opportunity
asterisk * are mandatory. All times are displayed as Pacific Time.
View as Supplier
1 - Community Information Tools (Open)
RFx Info
Documents
Suppliers
Approvals
Approval Workflow
envalt.ivalua.ca
Do you really want to close the RFx before the Closing Date and Time?
4
OK
Cancel
Cancel
[Site map] [Legal mentions]

4. Click **OK**.

Upload Submissions

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

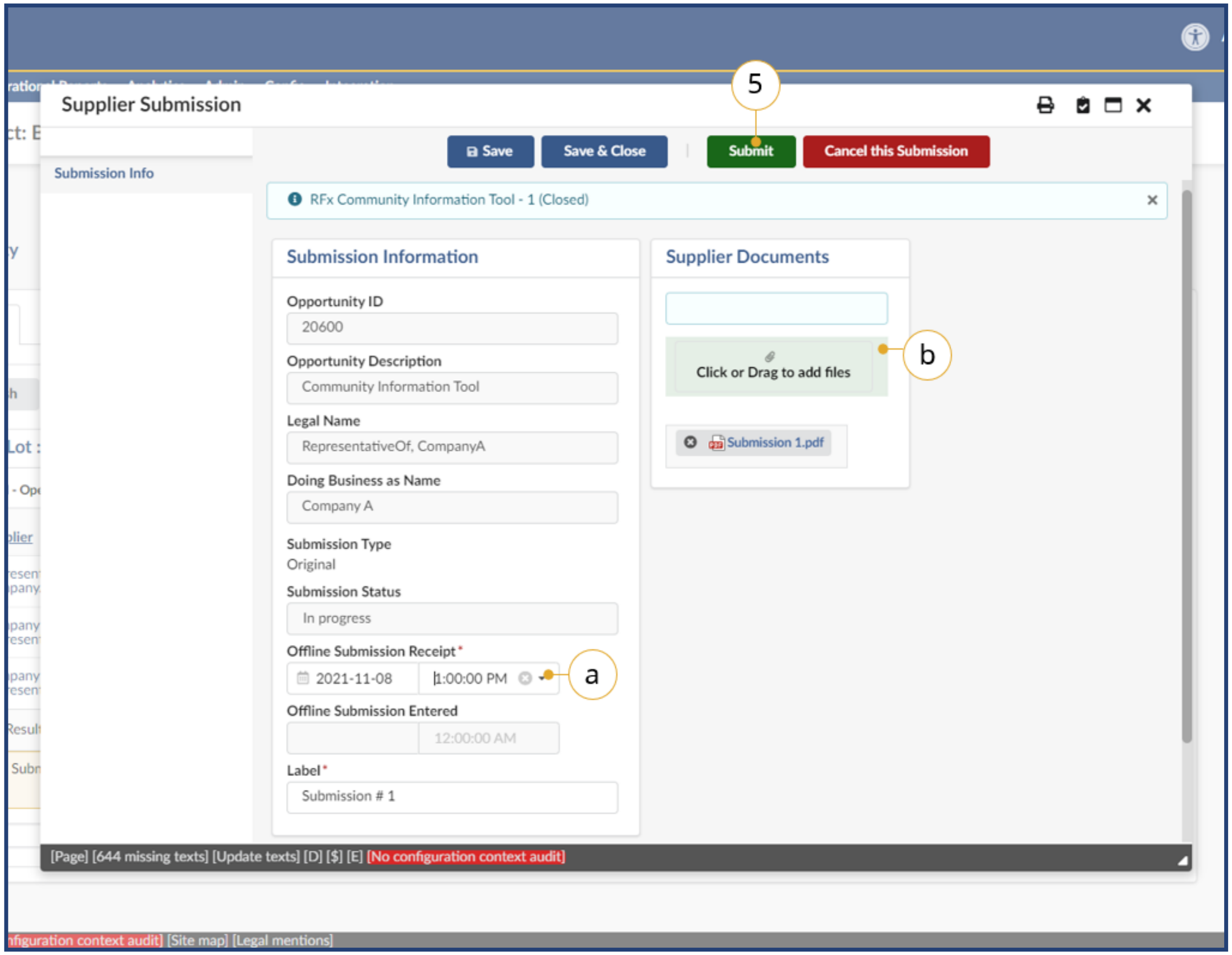


1. Using the left-hand menu, click **View RFx Activity**.
2. Select the **Declined** checkbox to track all invited Suppliers who did not provide a Submission.
3. Click the **+** button in the row of the Supplier whose Submission is being added.
4. Click the **Refresh** button to update the Submission 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.

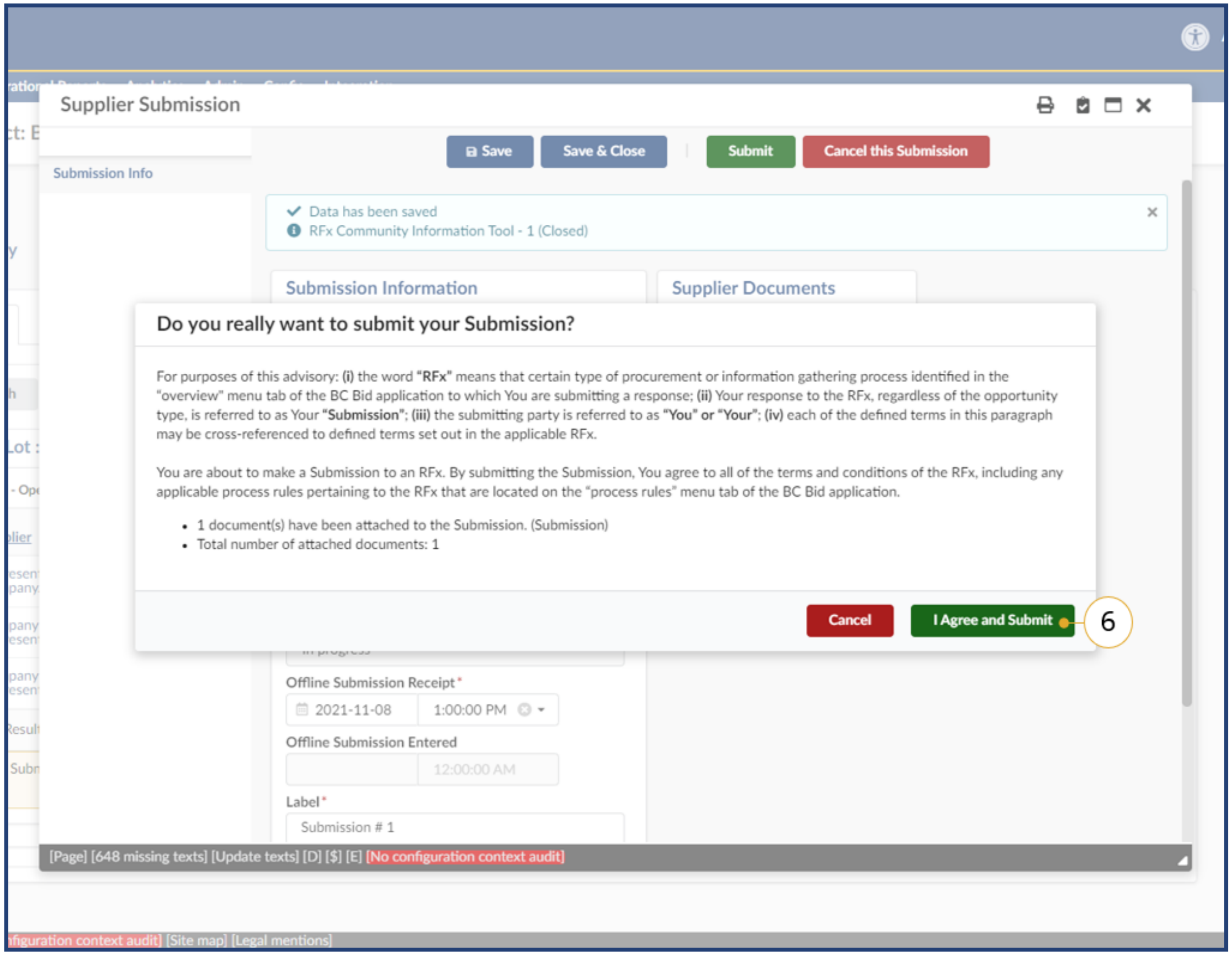


a. Select a date and time under **Offline Submission Receipt**

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

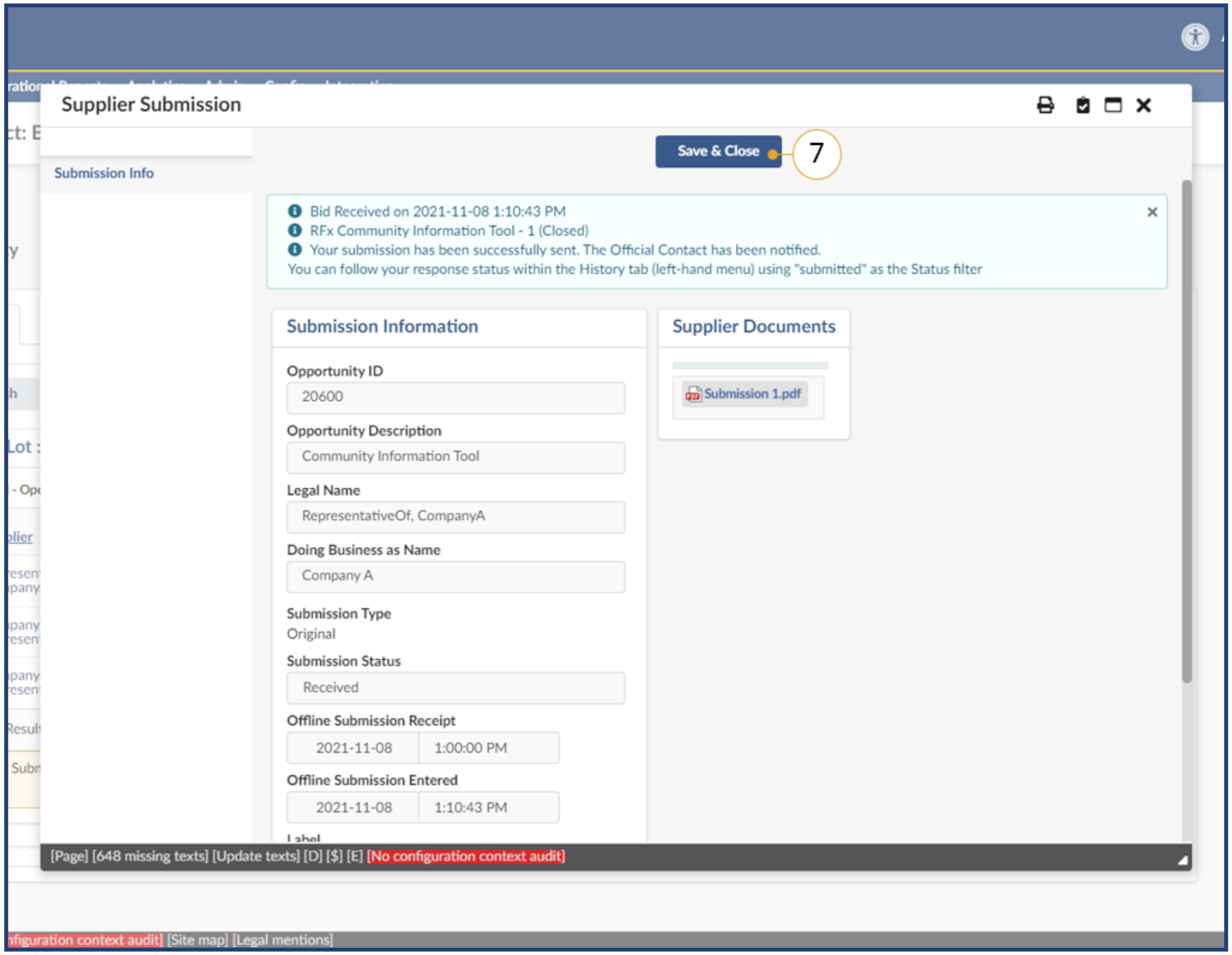
5. Click **Submit.**

   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**.

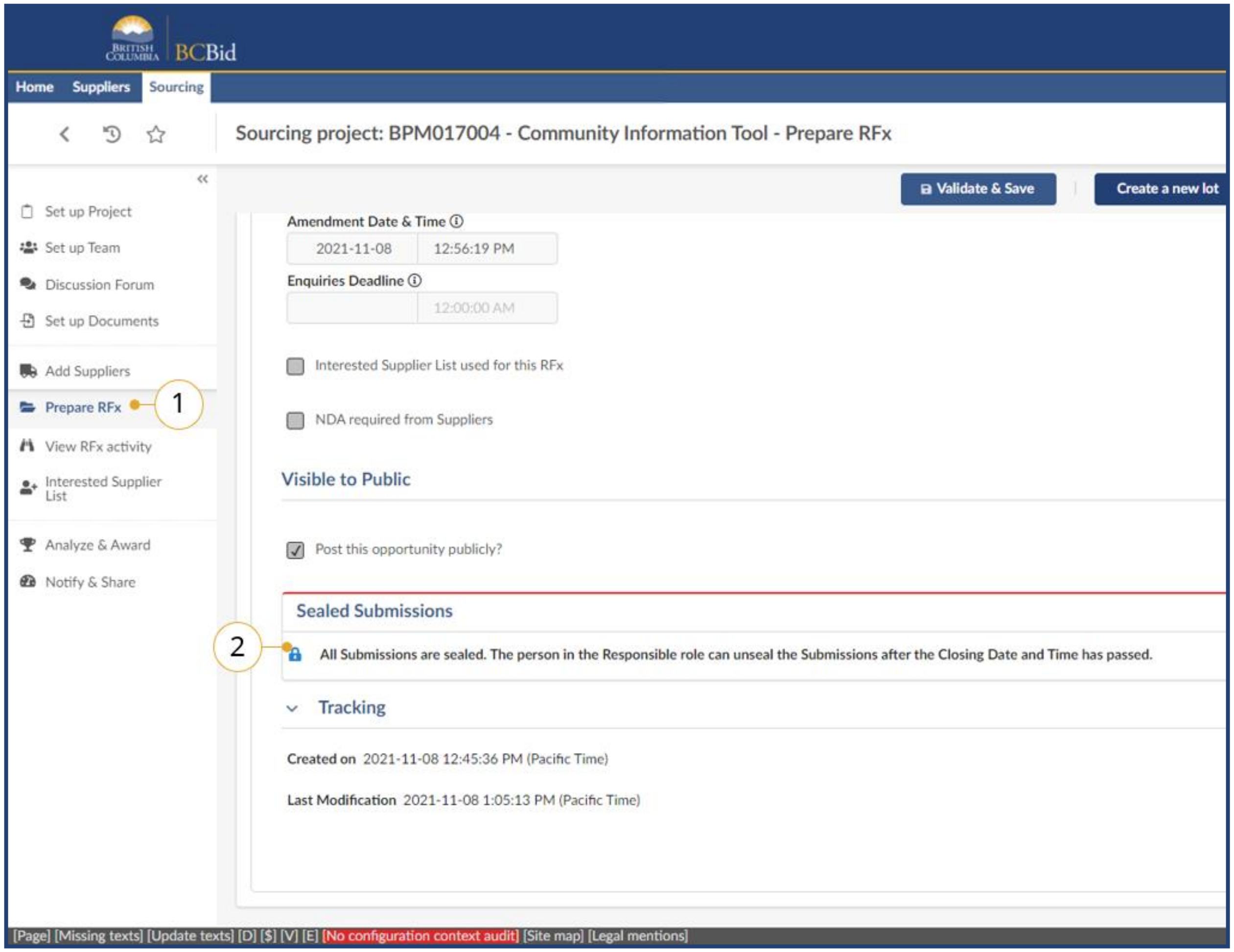
As a Buyer you are not agreeing to this pop-up advisory. It's a step required to upload a Submission into BC Bid for creation of the contract award notice within your Opportunity.



7. Click **Save and Close**

Unseal Submissions

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



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.

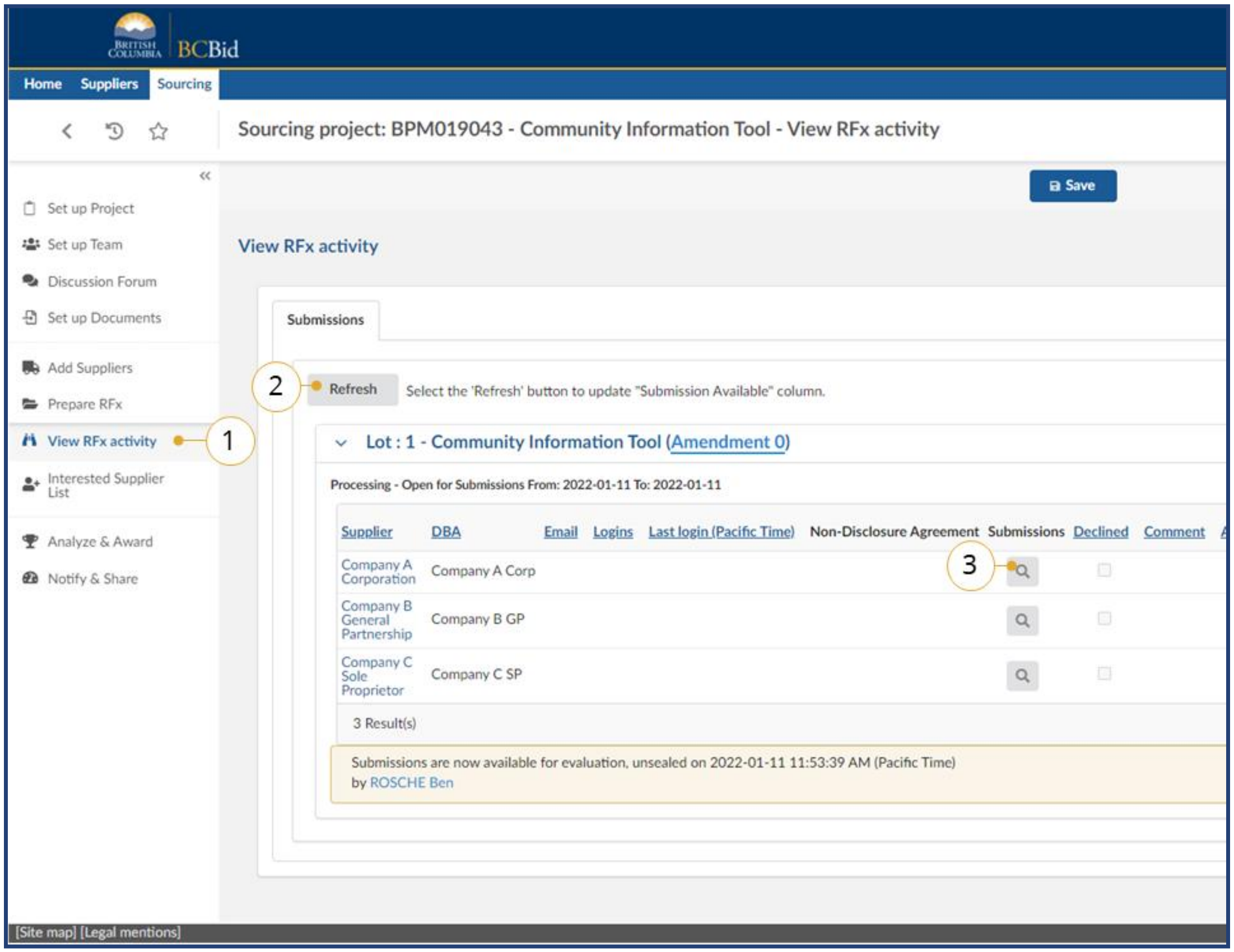
   Note: A pop-up will display before unsealing submissions with the following:

   > '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]

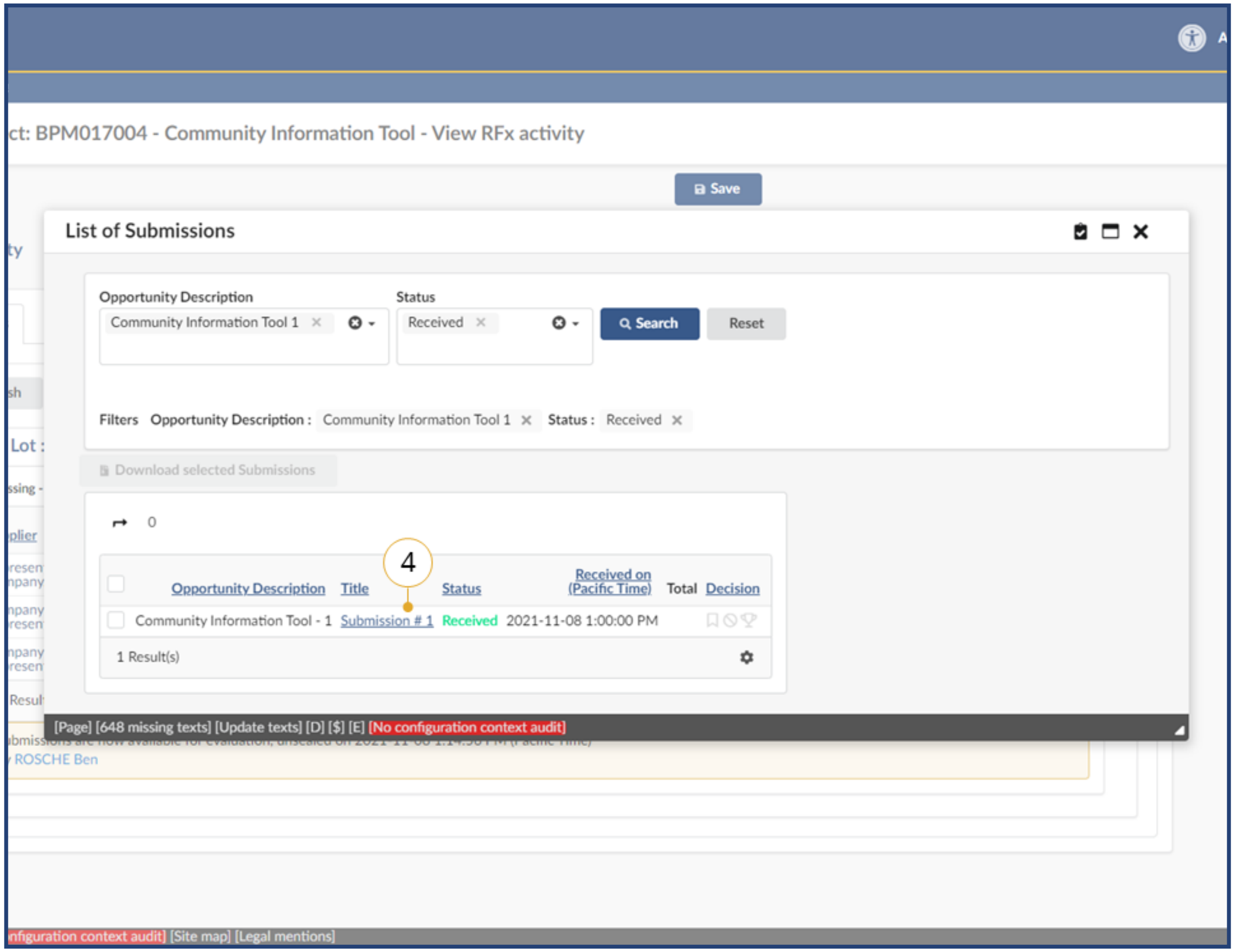
Step 6 – Analyze and Award

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).

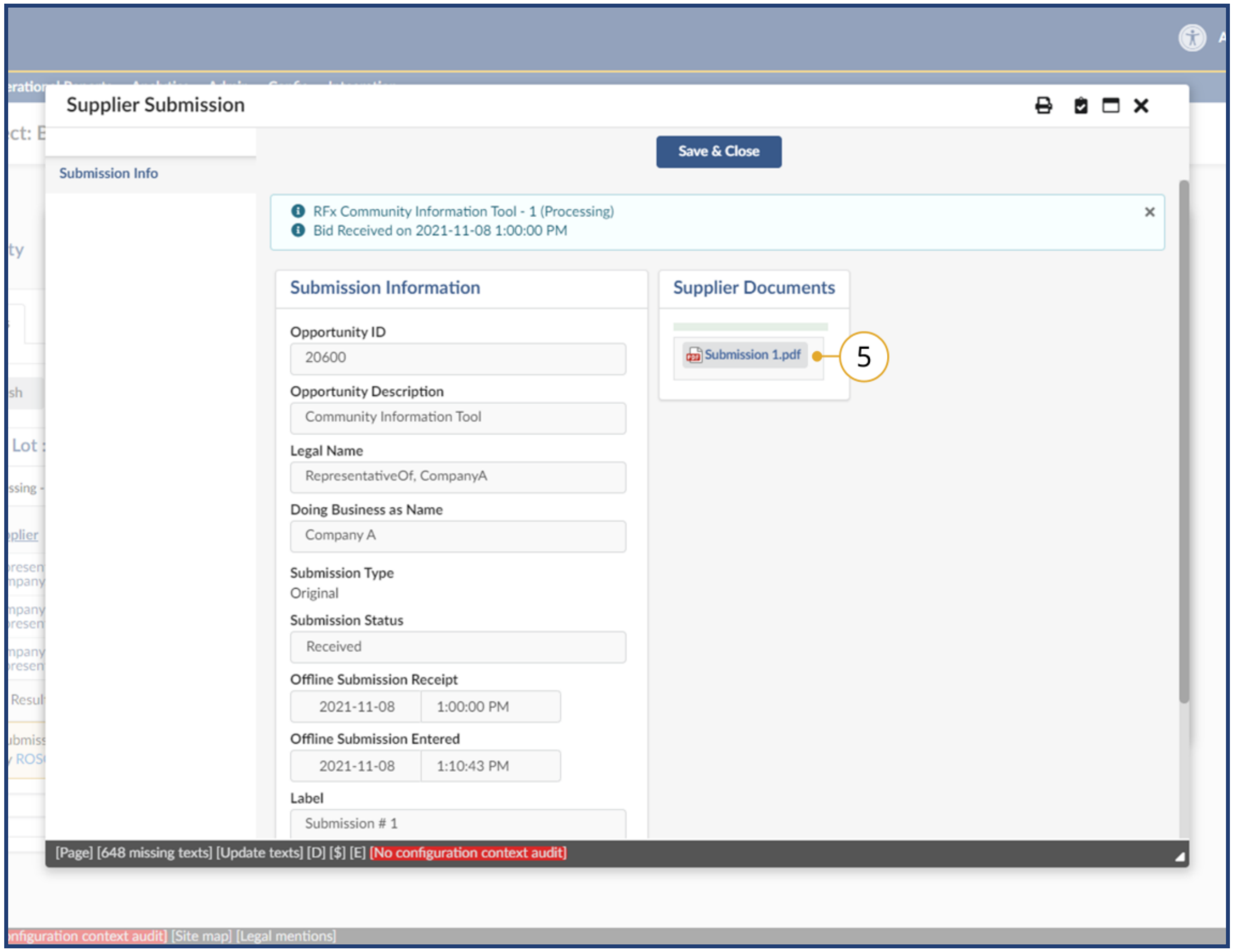


4. Click the **Title** hyperlink.

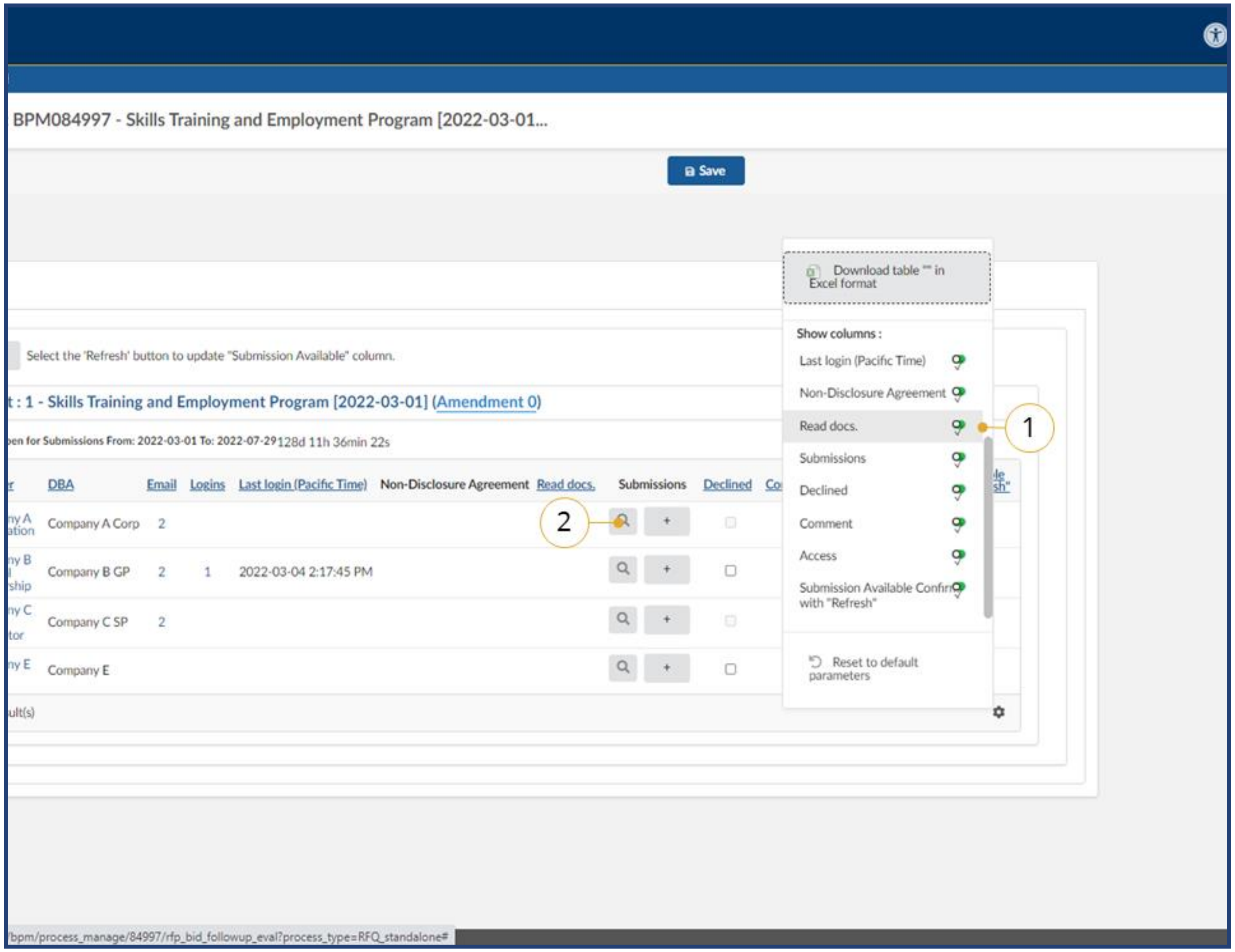
   Notes: If alternative submissions are allowed, select all Submissions to download them.

   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.



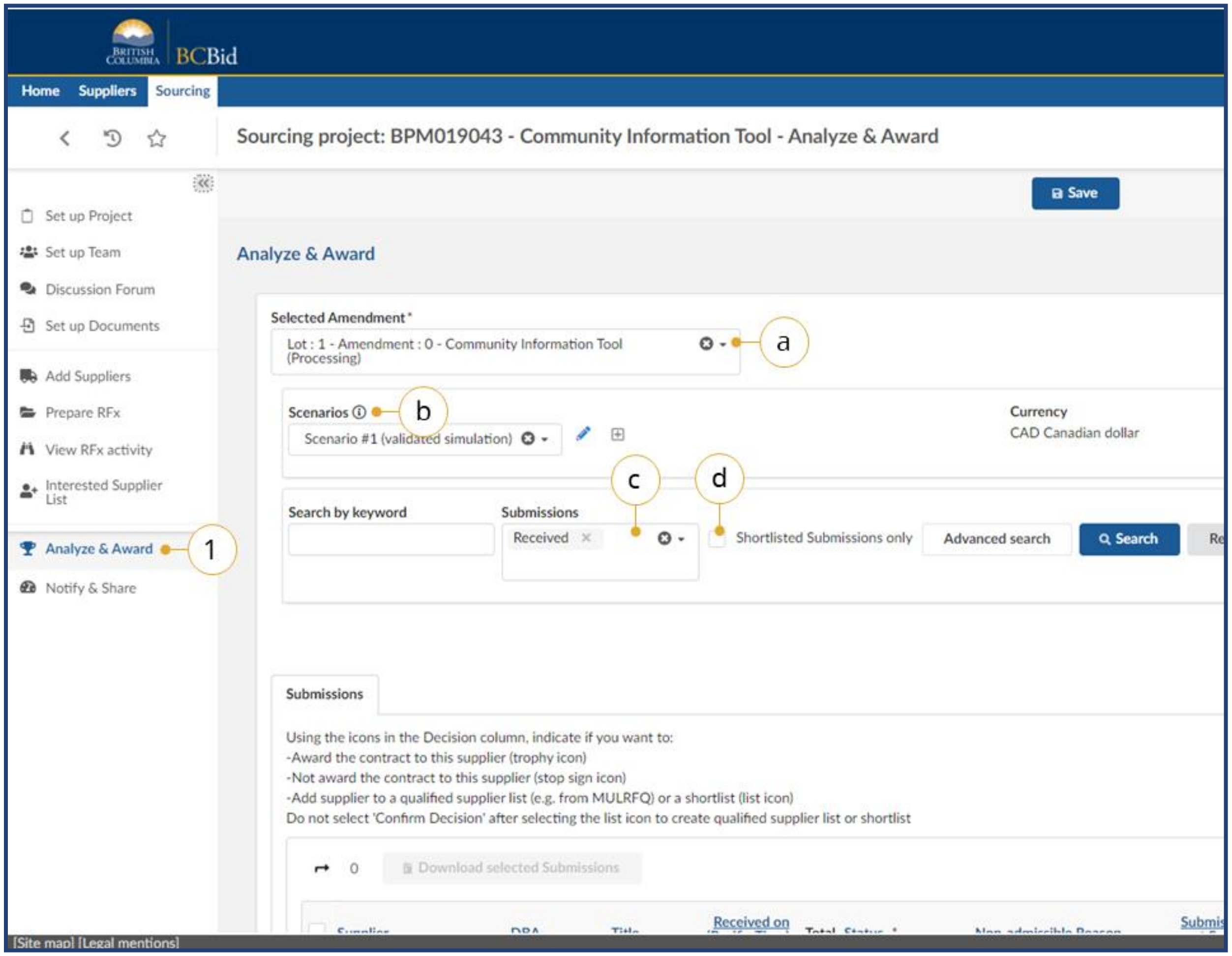
5. Click the Submission(s) in the **Supplier Documents** section to download.
   Note: document count field will detail the number of documents attached to the submission



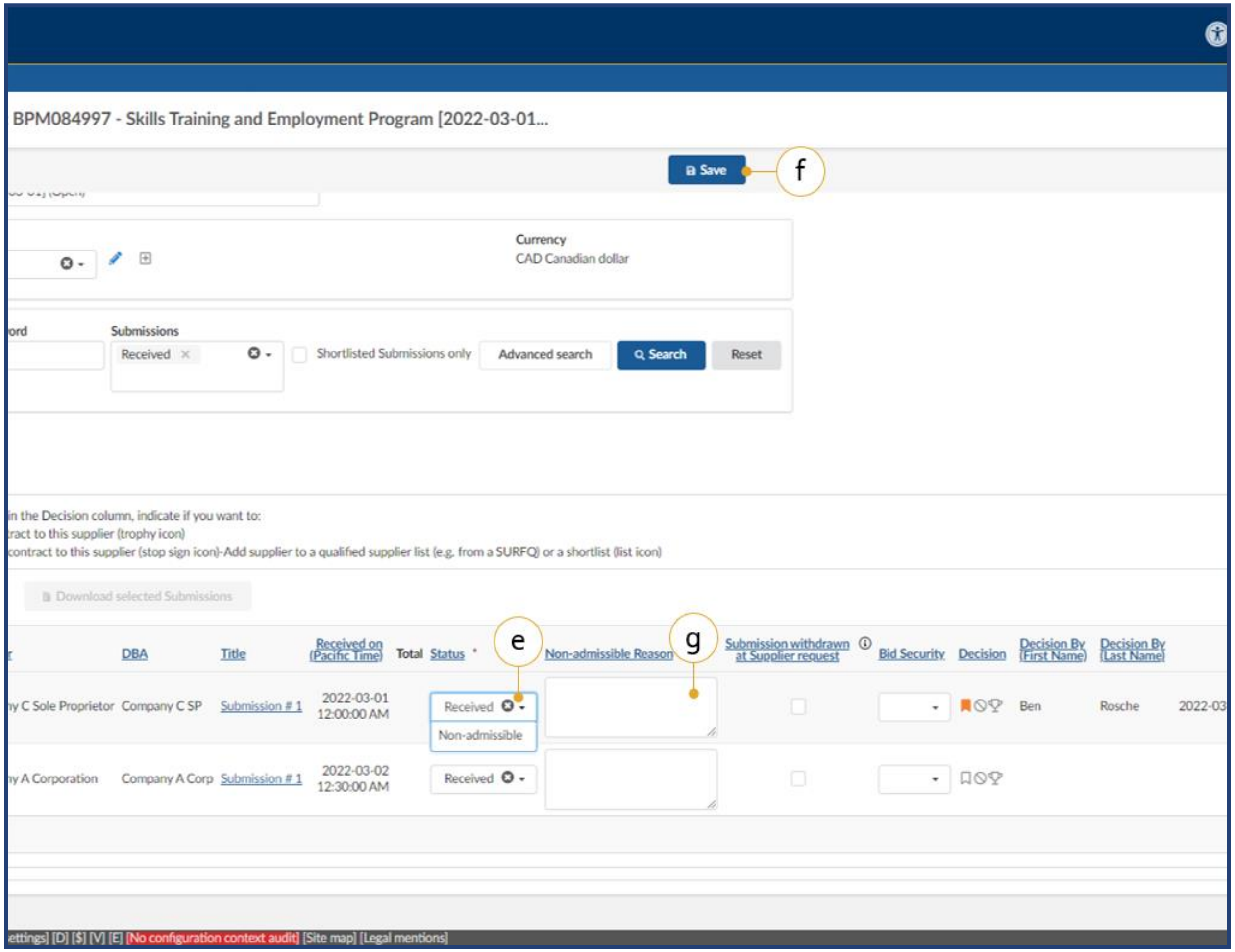
Alternatively, a Buyer may choose to show the Read Docs column, to review the Submissions.

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

Decision – Award Submissions

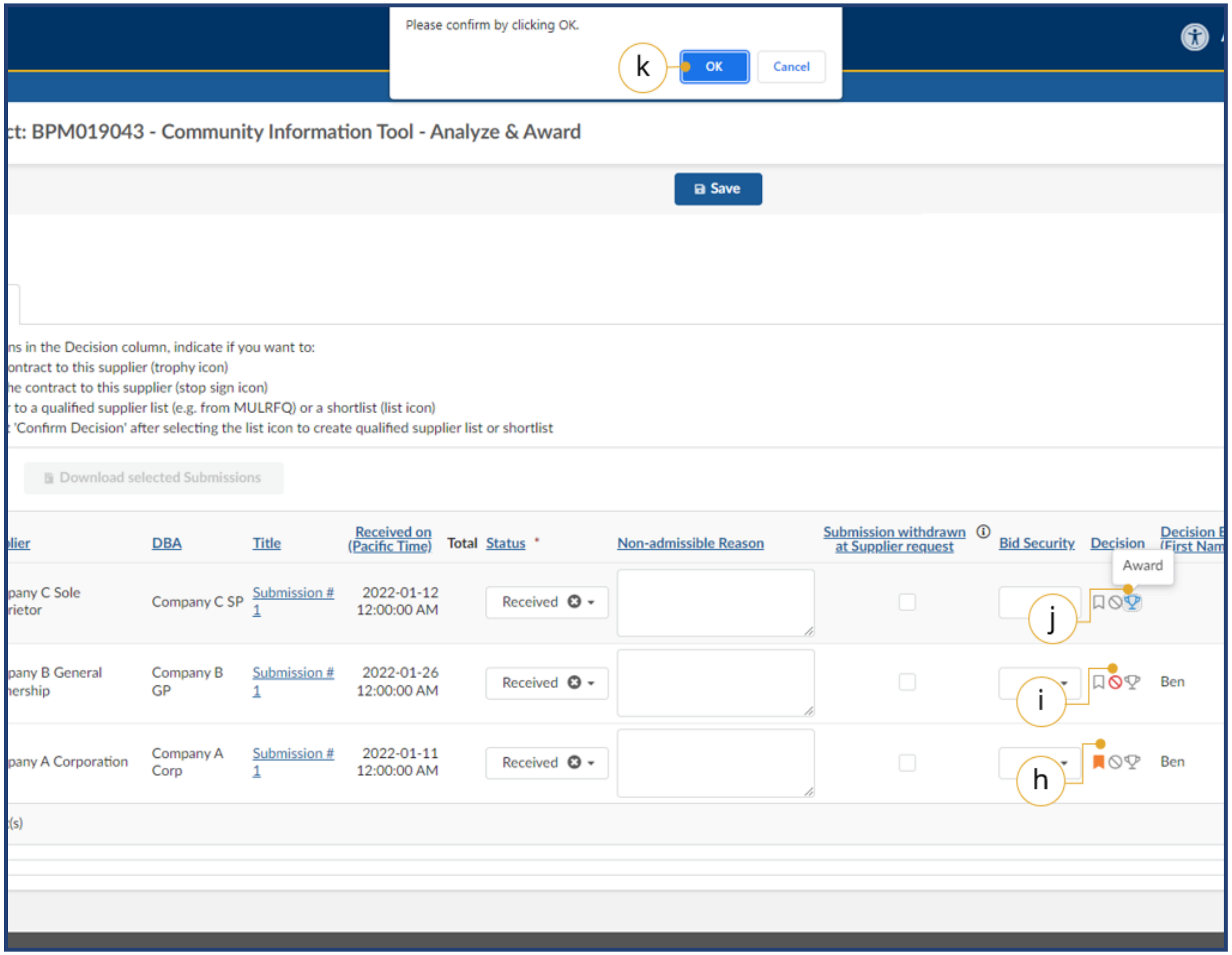


1. Navigate to the **Analyze & Award** tab.
   a. Using the Selected Amendment dropdown, ensure the most recent Amendment is selected.
   b. The Scenarios section will not be used.
   c. Use the Submissions dropdown to filter between Received or Non-admissible Submissions.
   d. Click the Shortlisted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

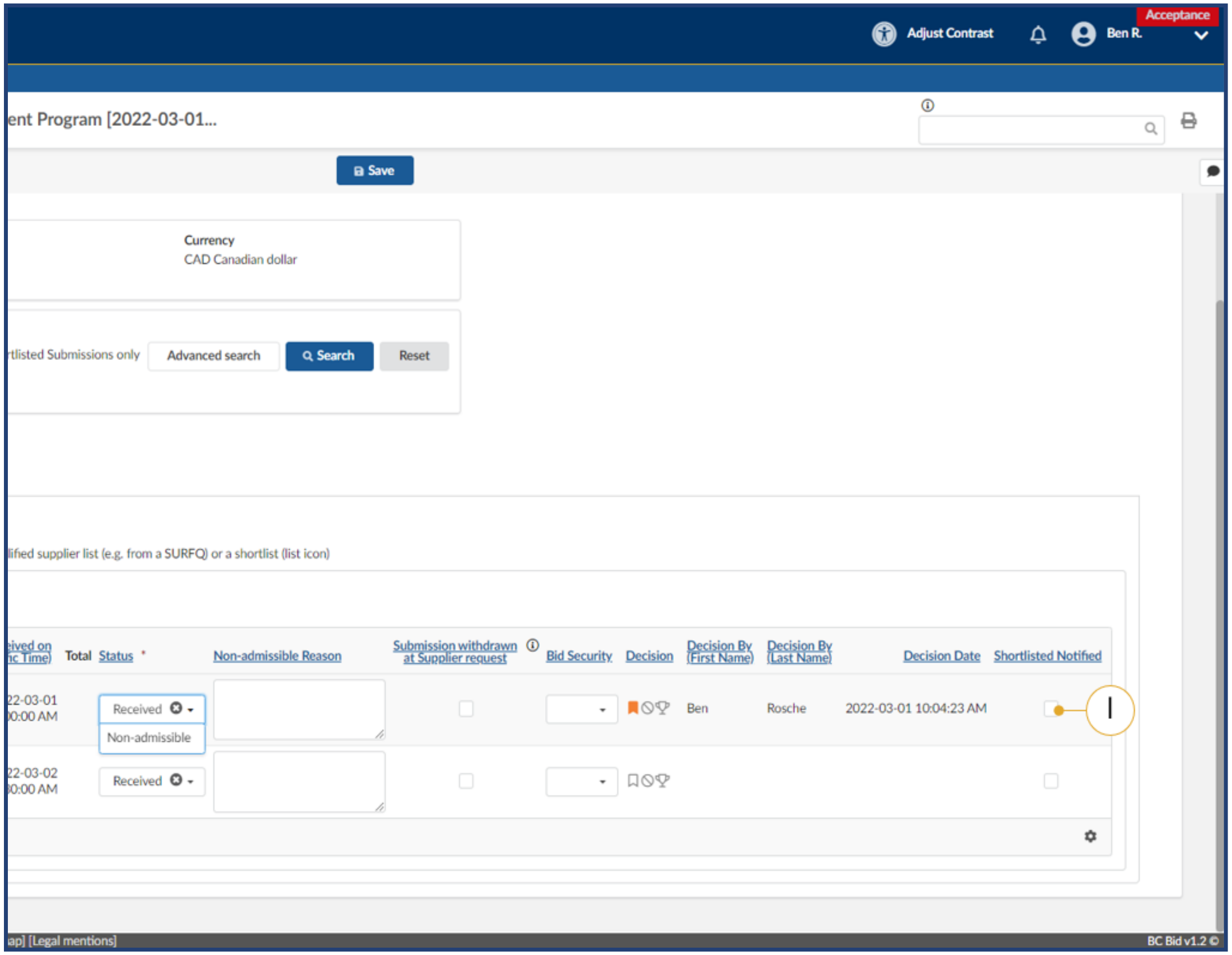
Note: This step must be completed after all official notifications are sent to the Suppliers as Suppliers can see the updated status on their Supplier Dashboard.



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.

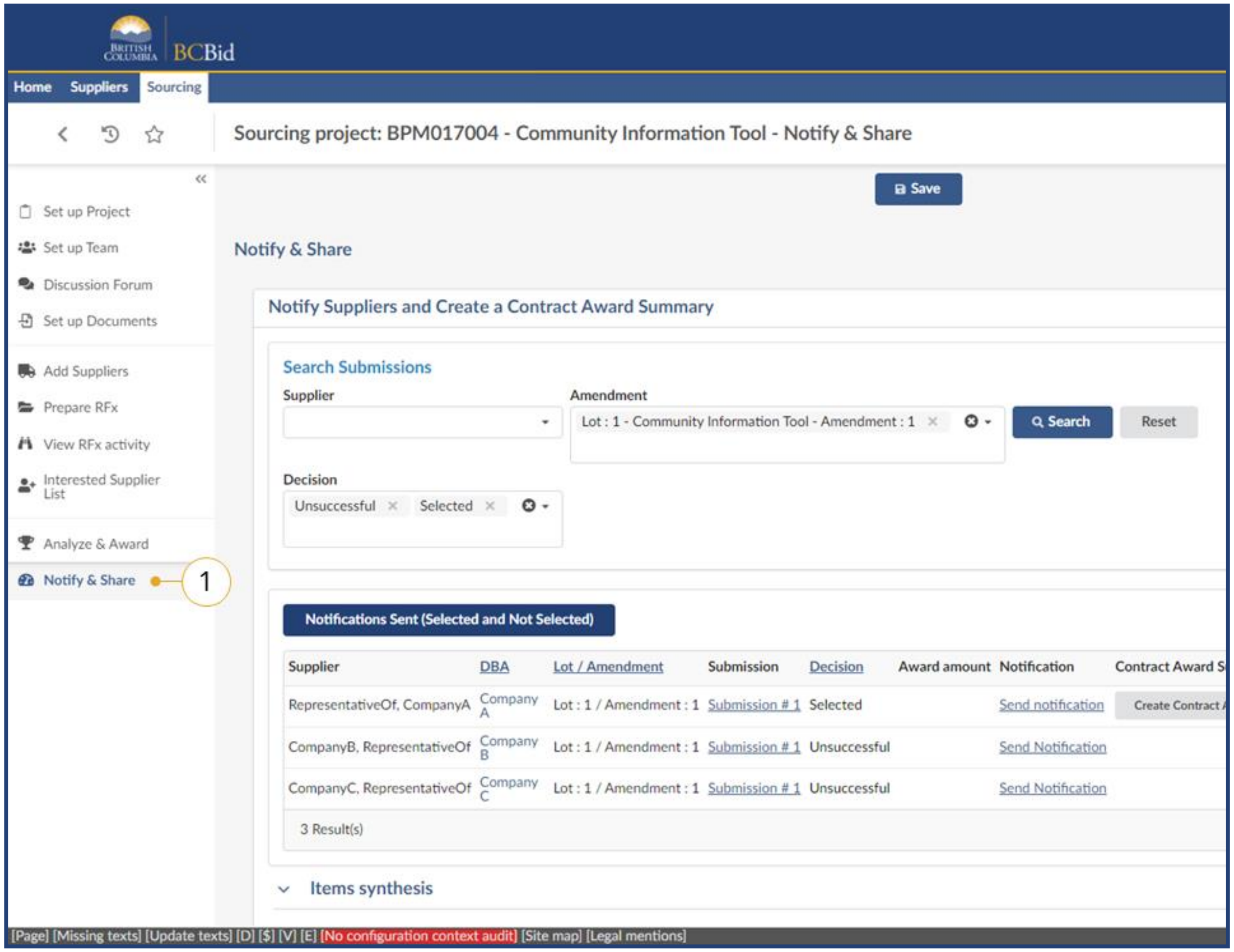


l. After sending notifications to those who qualified to a Qualified Suppliers List, see Send Notifications, select the **Shortlisted Notified** checkbox next to the qualified Supplier(s) to internally keep track of whether or not the shortlisted supplier has been notified.

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?

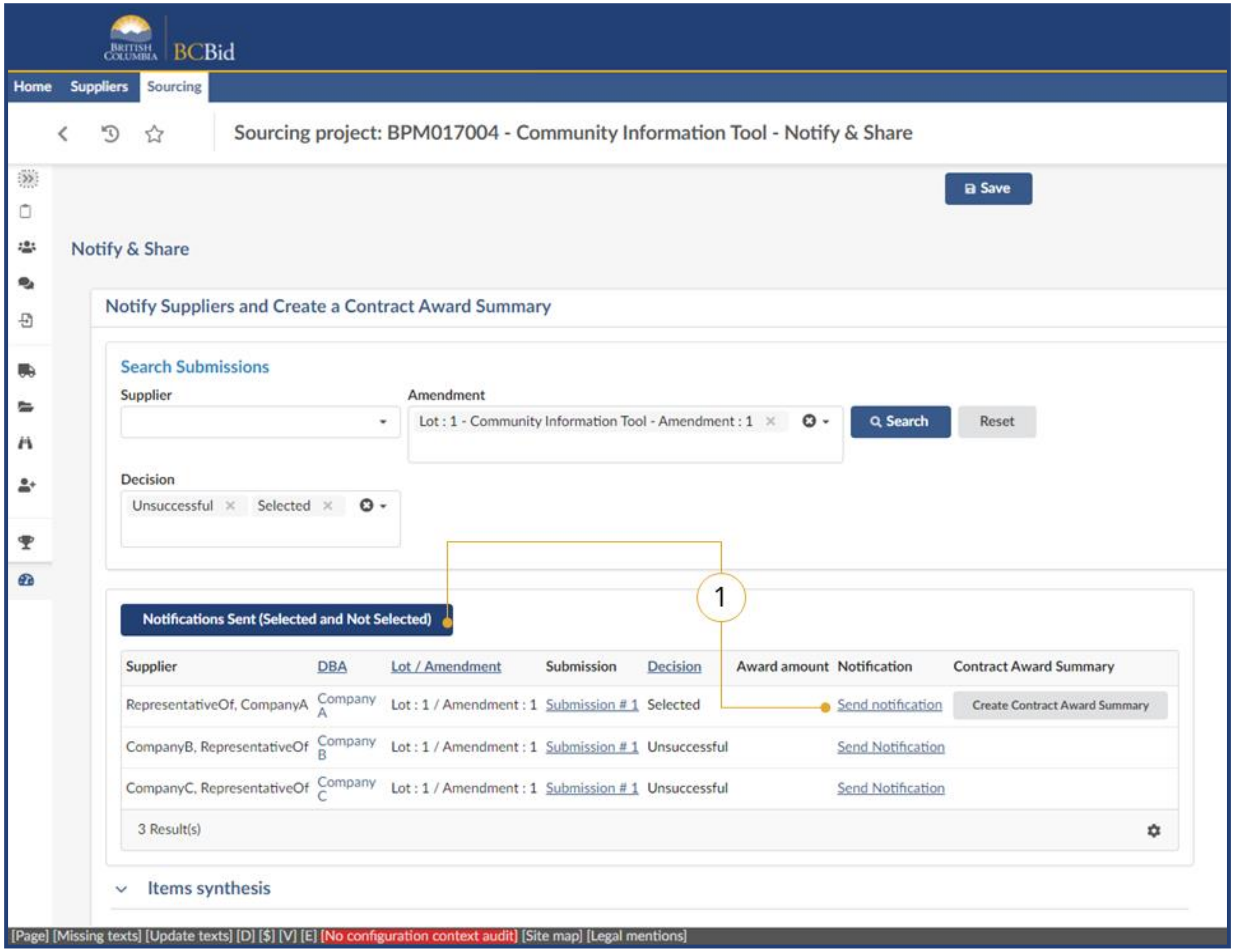
If the unsuccesful proposals are in BC Bid, and unsealed, you must mark them as 'Do Not Award' in the Analyze & Award Tab (page 121) and then you will be able to send 'unsuccessful' notifications to the unsuccessful suppliers using the Notify and Share Tab.

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



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

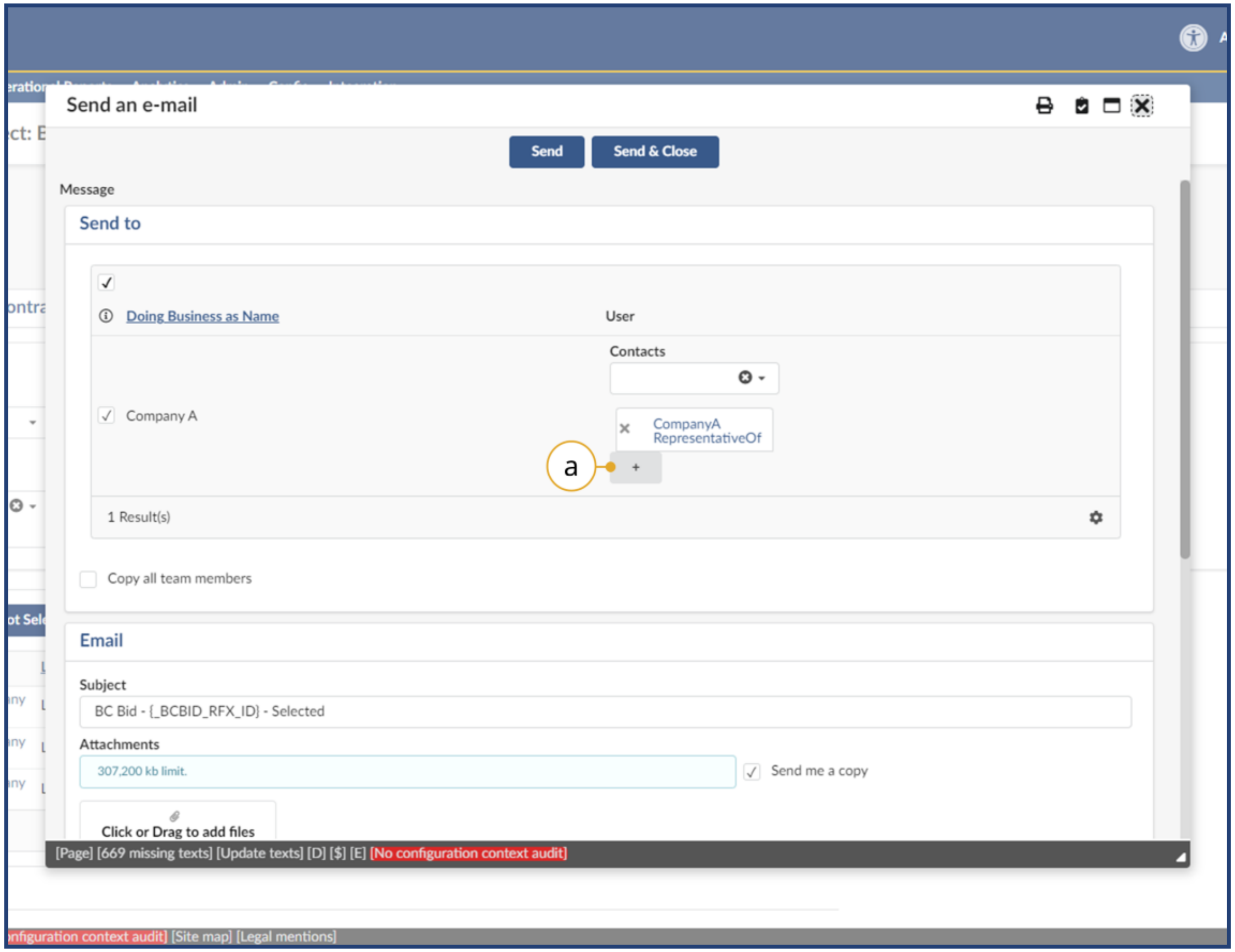
Click **Notifications Sent (Selected and Not Selected)** or the **Send notification** hyperlink in the Notification column.

> **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.

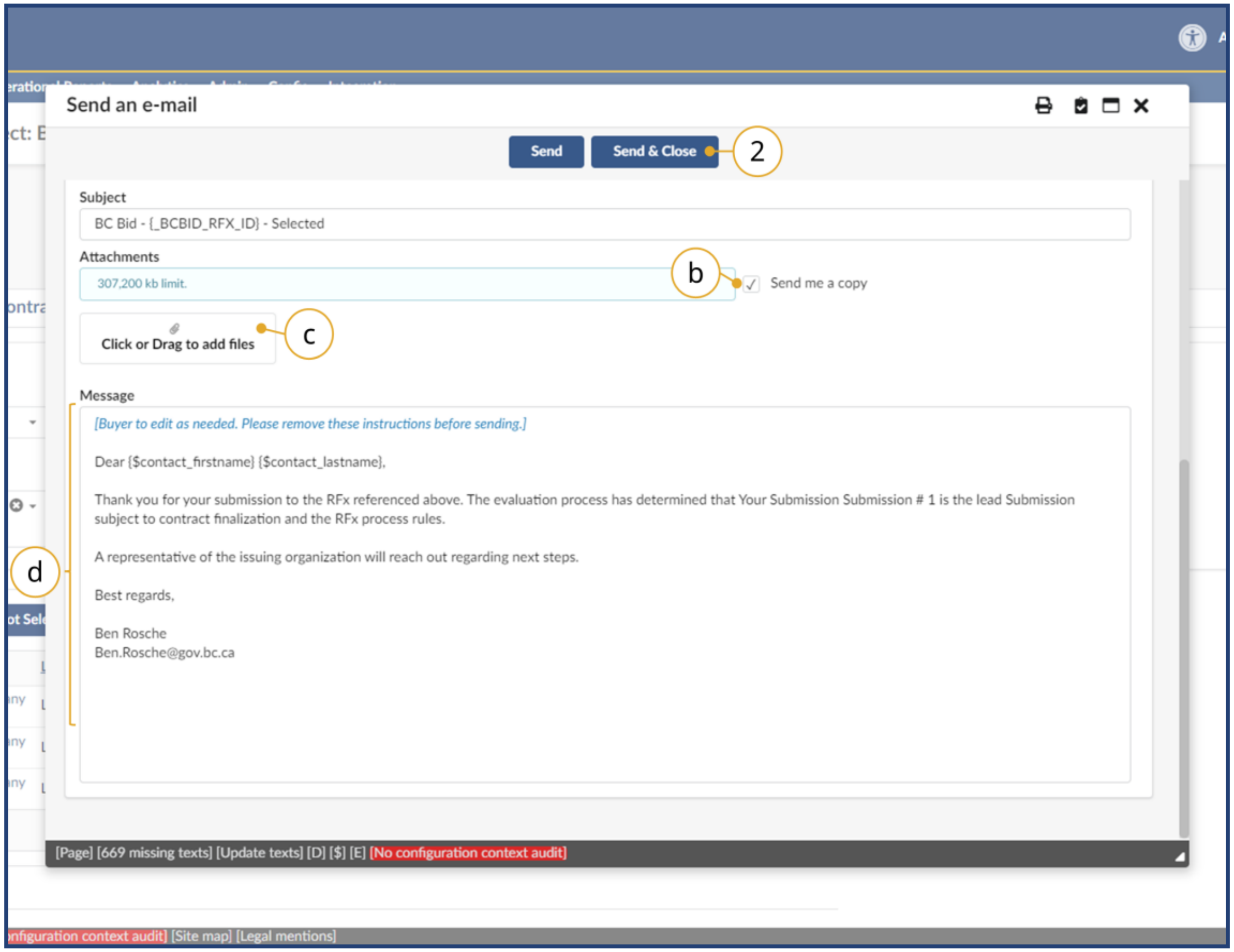
[Sending Award Results Notification to Suppliers]

[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.

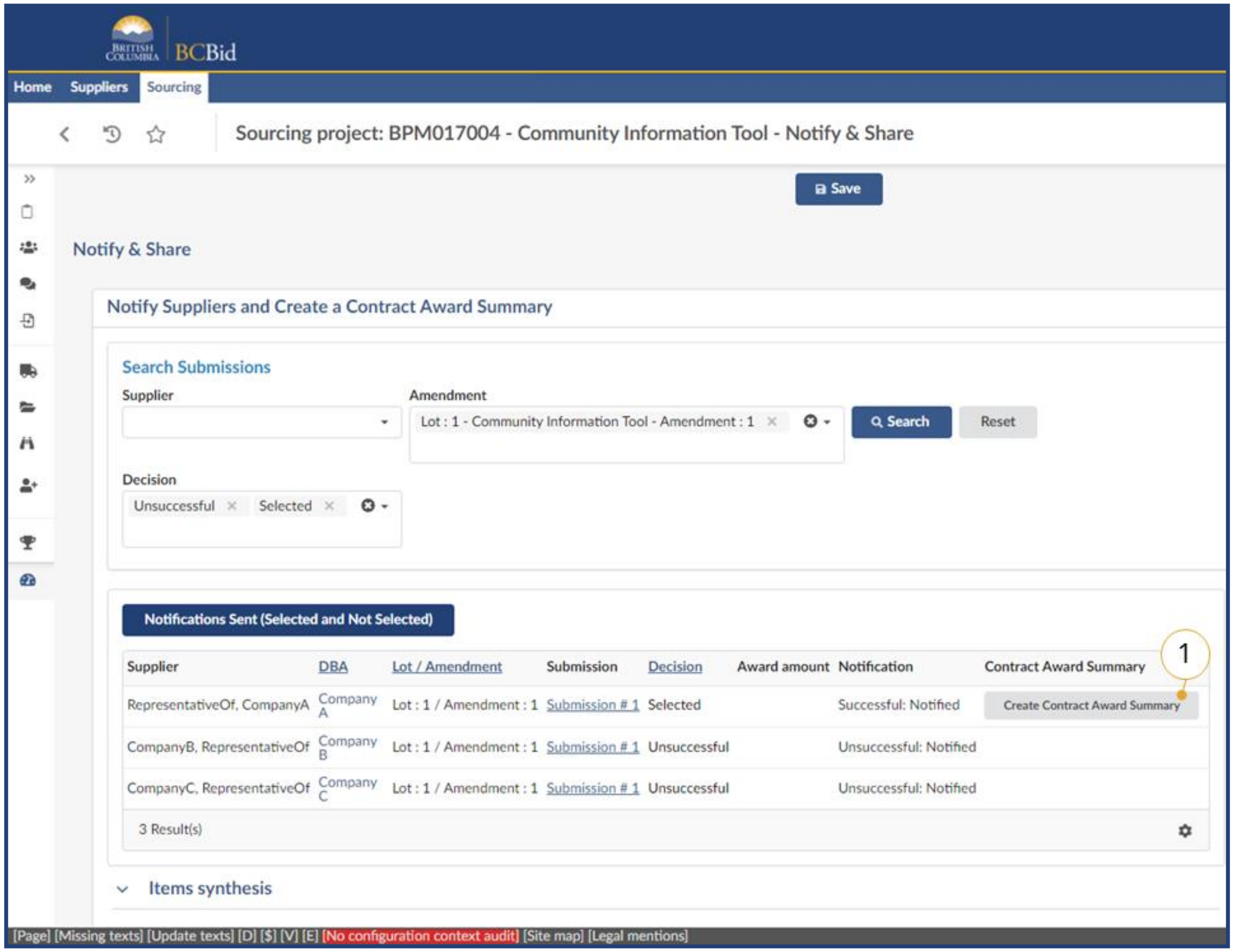
c. *Optional:* Click **Click or Drag to** add files or drag a file.

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

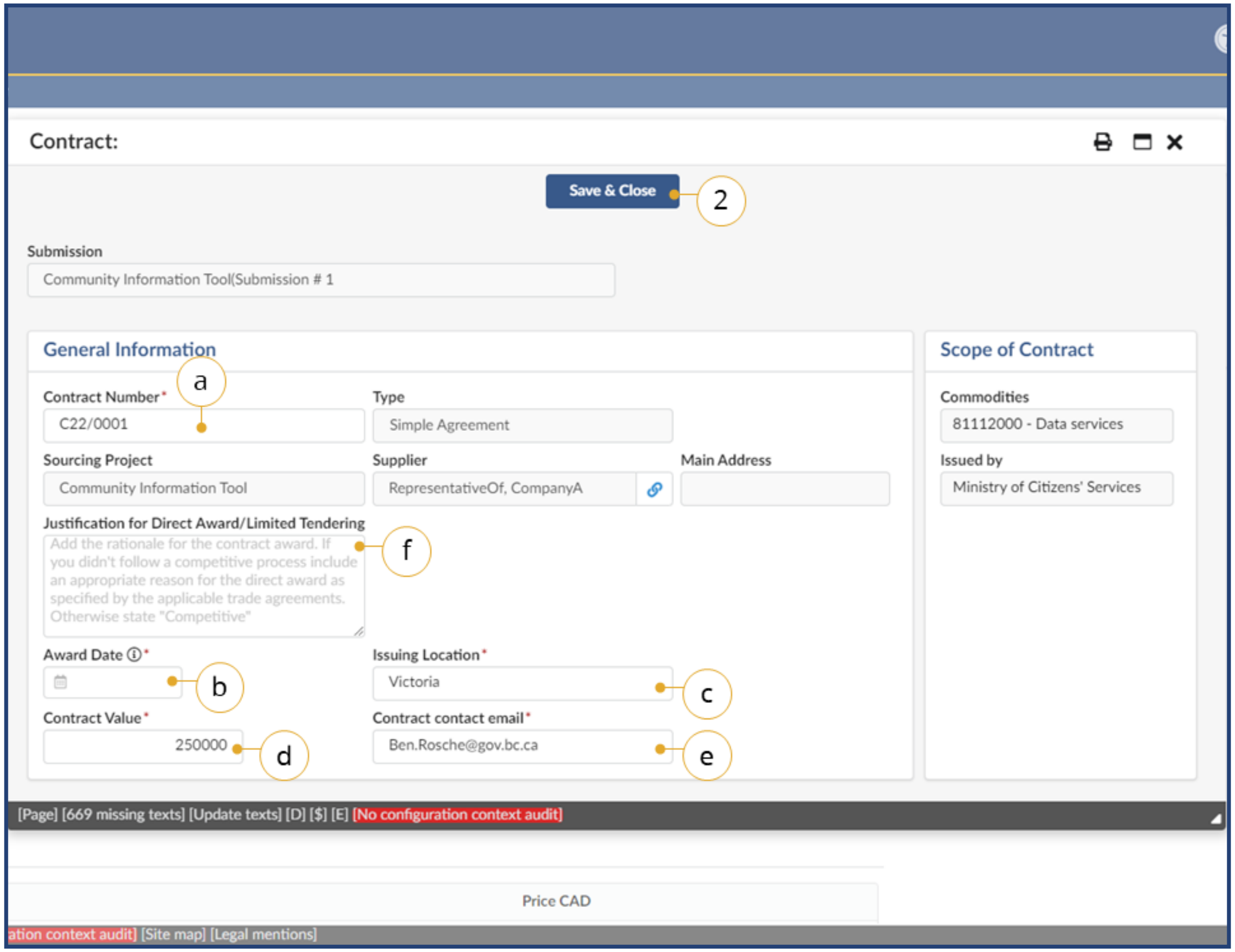


1. Click **Create Contract Award Summary**.

[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.

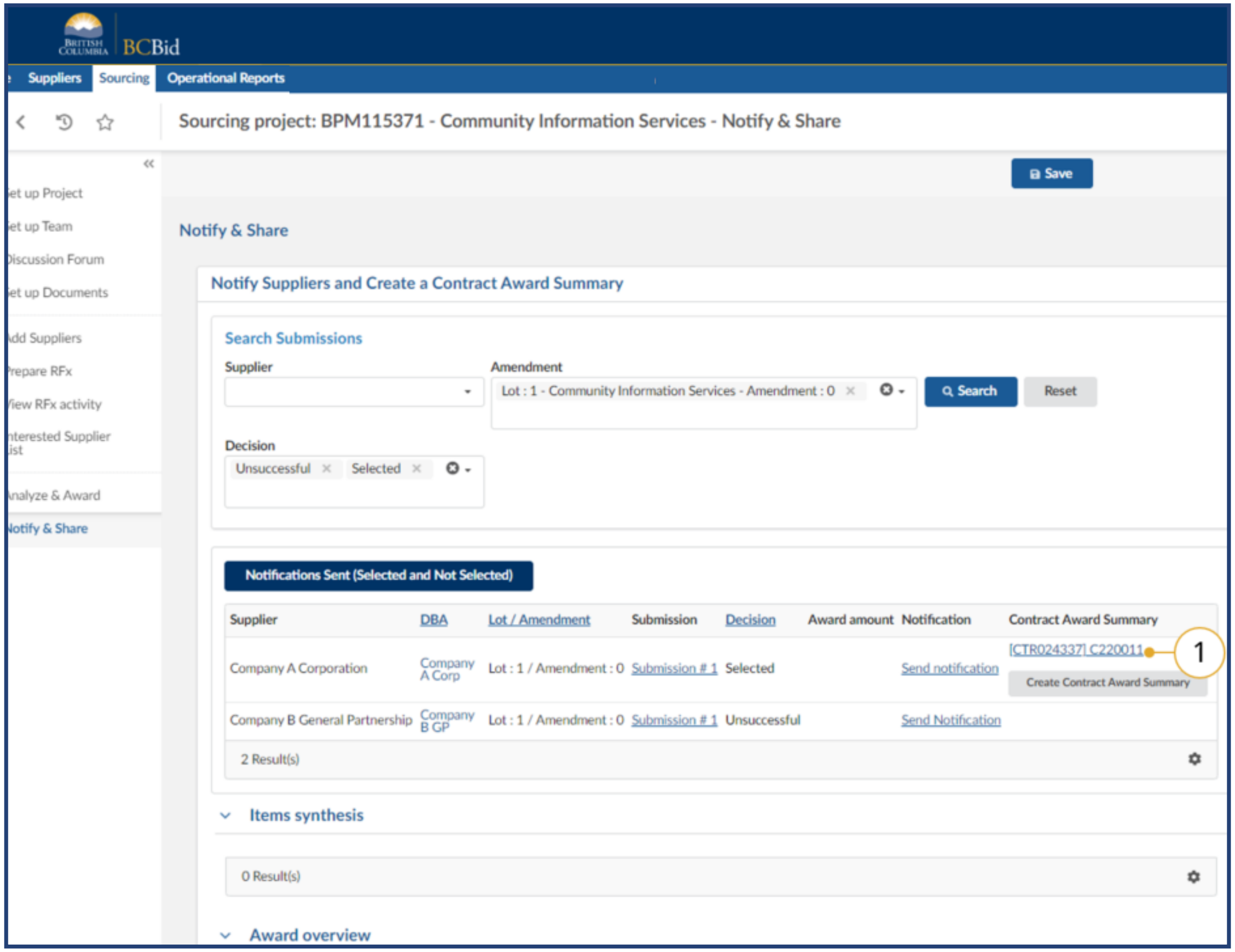


In the Contract window, complete the following:

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.

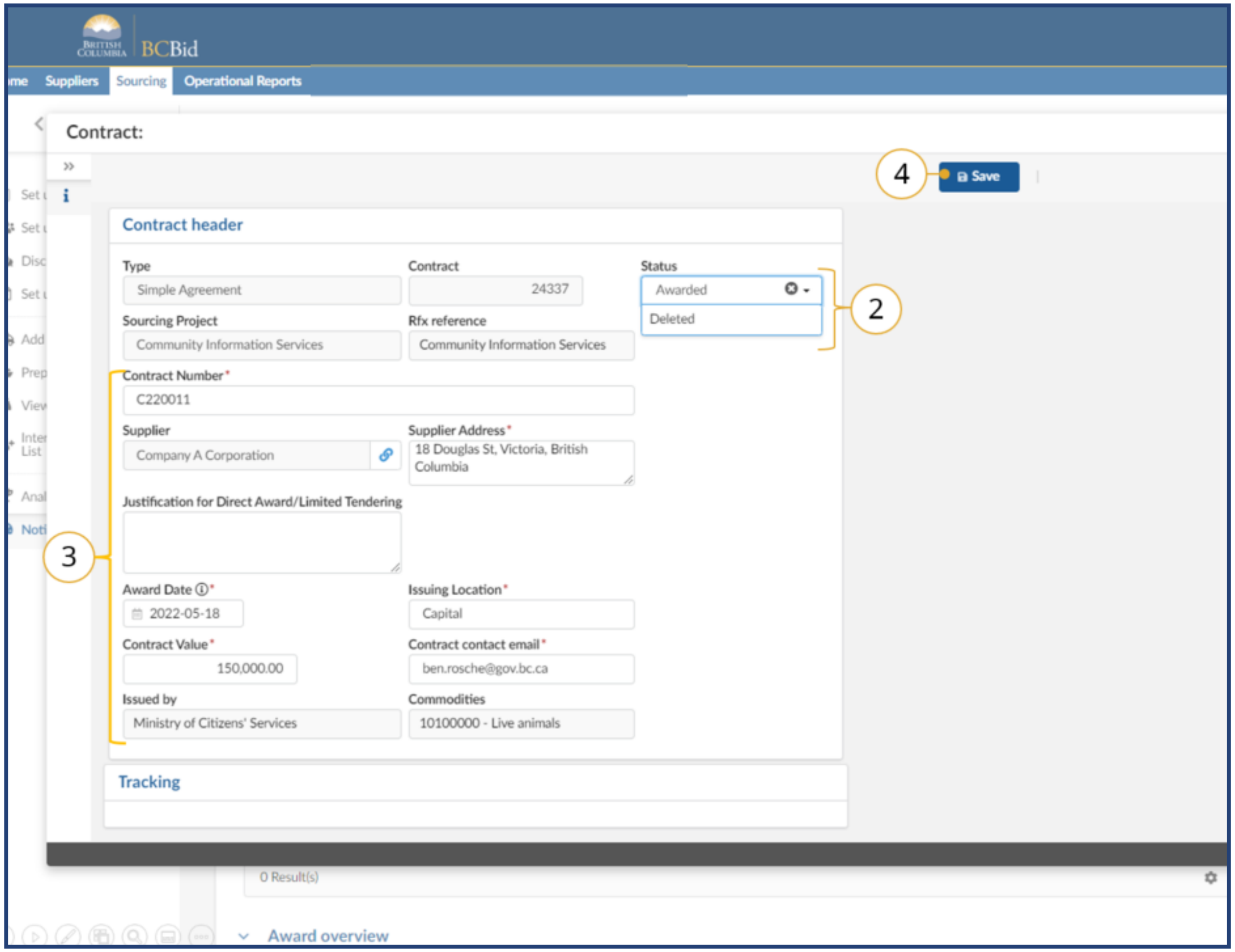
2. Click **Save & Close**.

Edit or Delete a Contract Award Summary



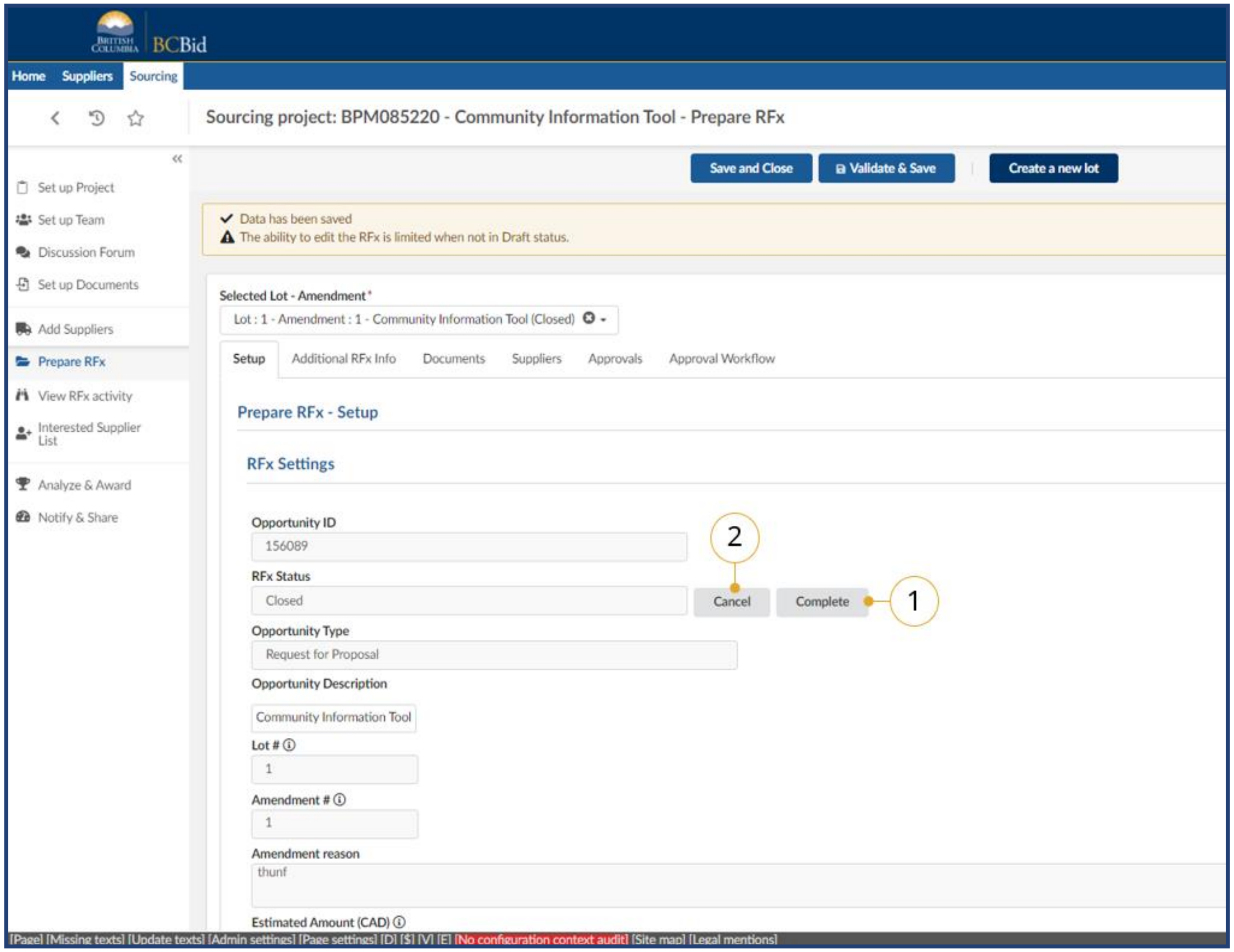
1. Select the hyperlink anpve the Create Contract Award Summary button.

This action cannot be completed after the steps identified in End Opportunity.

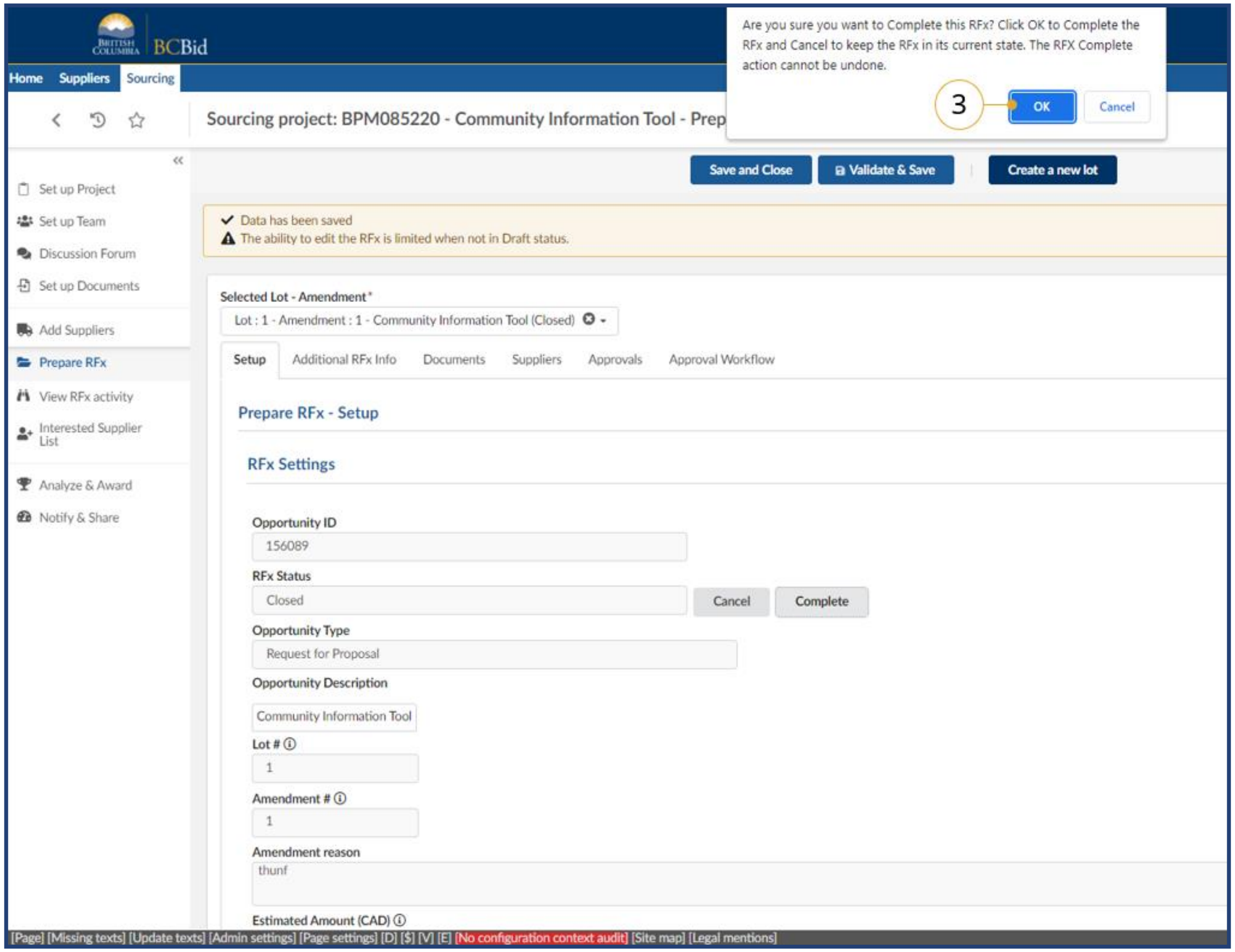


2. In the **Status** dropdown, select Awarded, if the Contract Award Summary is being edited. Select Deleted if the Contract Summary is to be removed from the Public Portal.
3. If editing, edit the relevant fields.
4. Select **Save**.

Complete an Opportunity



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



3. Click the **OK**.

Step 8 – Downstream Activities

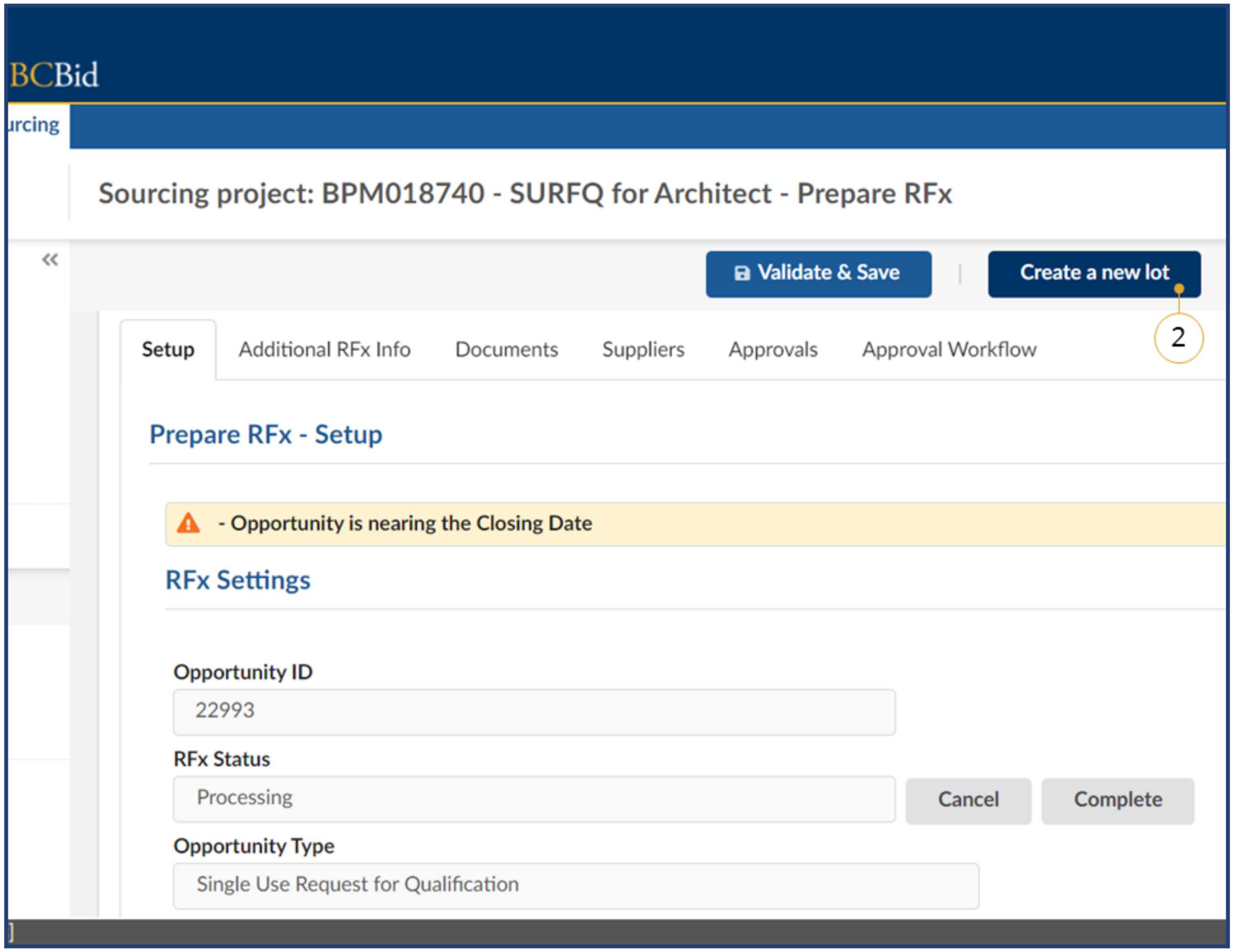
Opportunity	How used	See Page
MUL	Used on a new Sourcing Project and the associated Opportunity Type(s) by adding the Qualified Suppliers List through the Add Suppliers tab – Adding Suppliers From a Qualified Suppliers List.	140
SURFQ	Used for an Opportunity immediately downstream to the creation of 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.

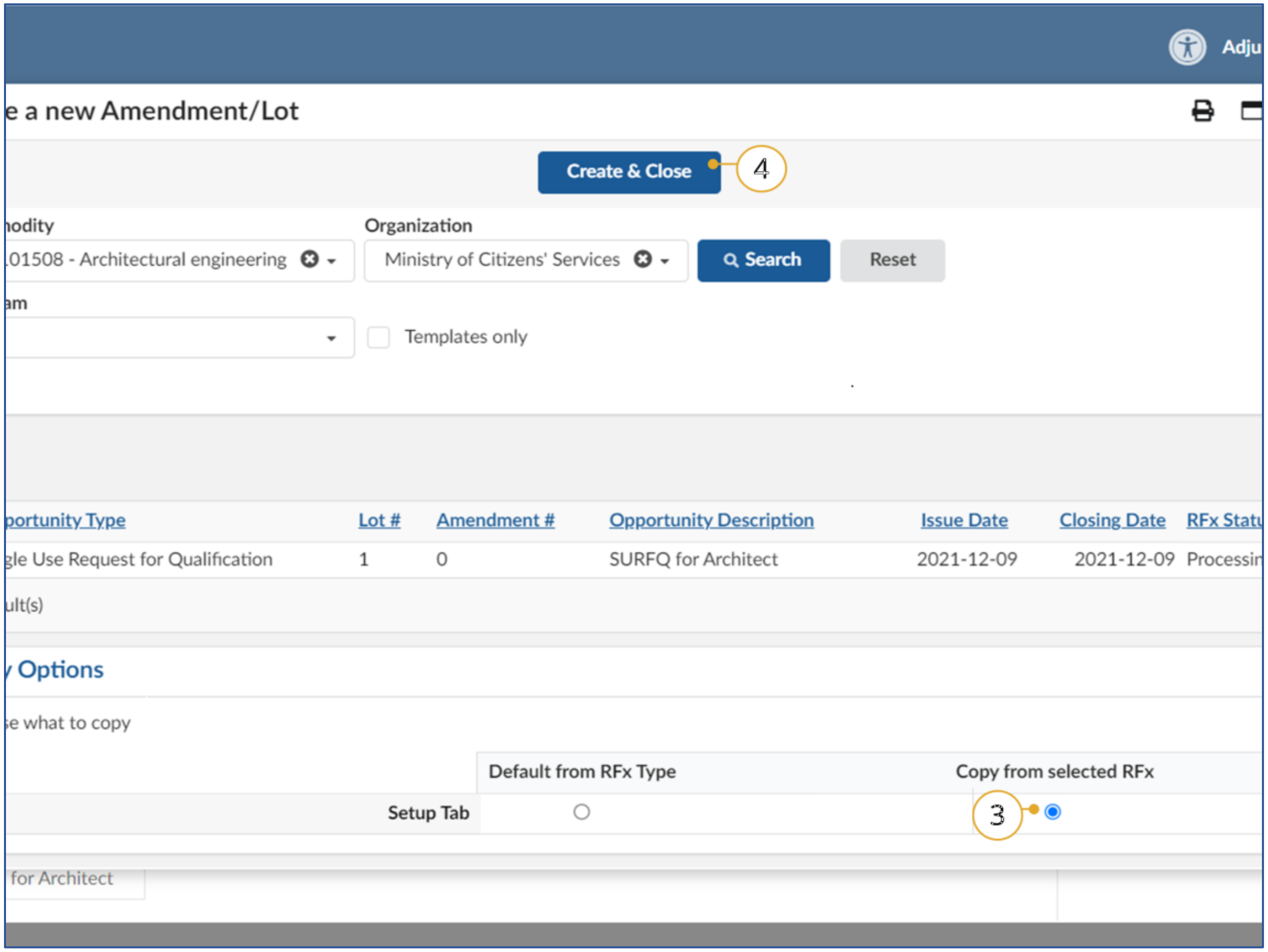
Single-use Request for Qualifications Downstream Process



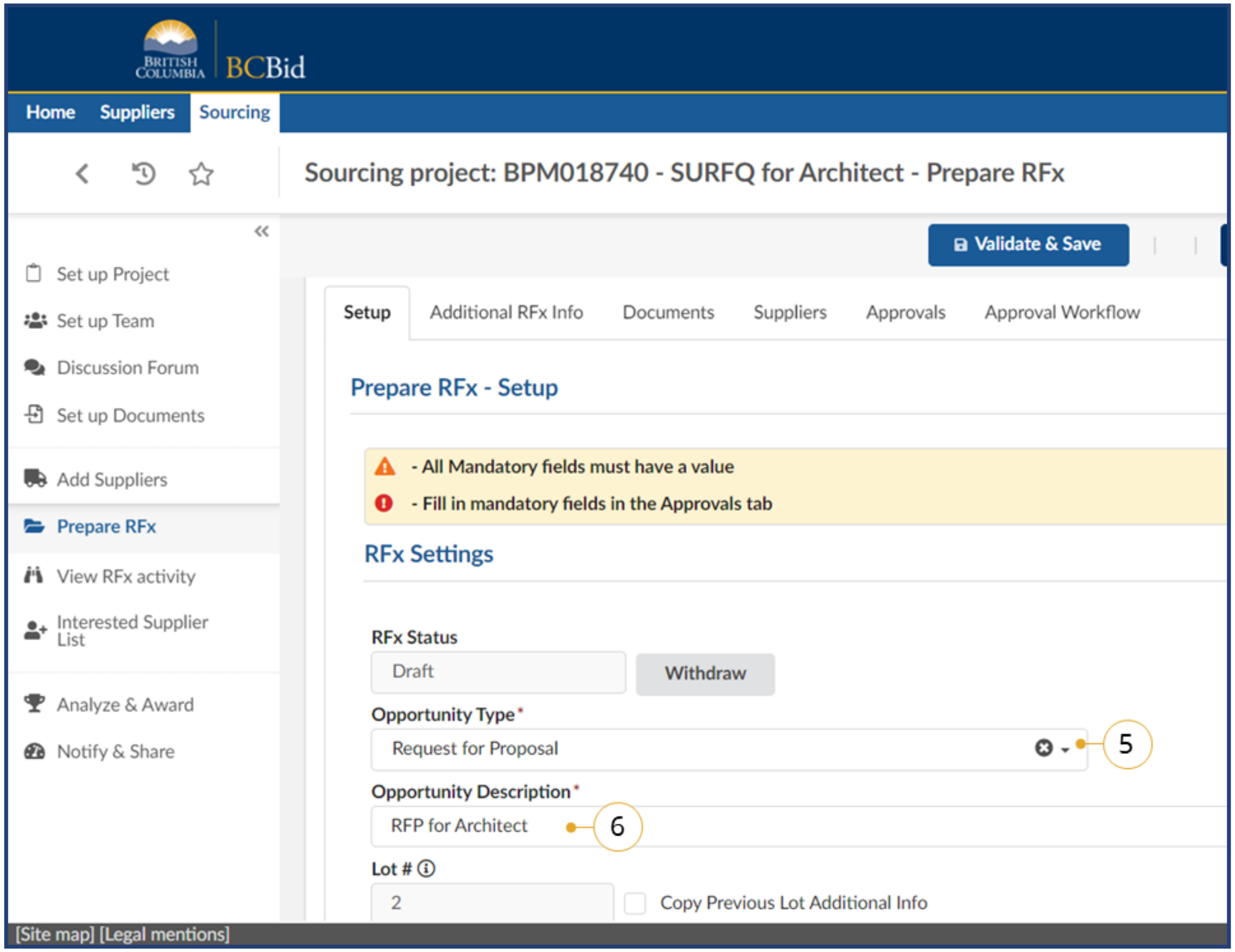
1. In the left-hand menu, click **Prepare RFx**.
2. Click **Create a new lot**.

[How to Transfer a Qualified Suppliers List from a SURFQ]

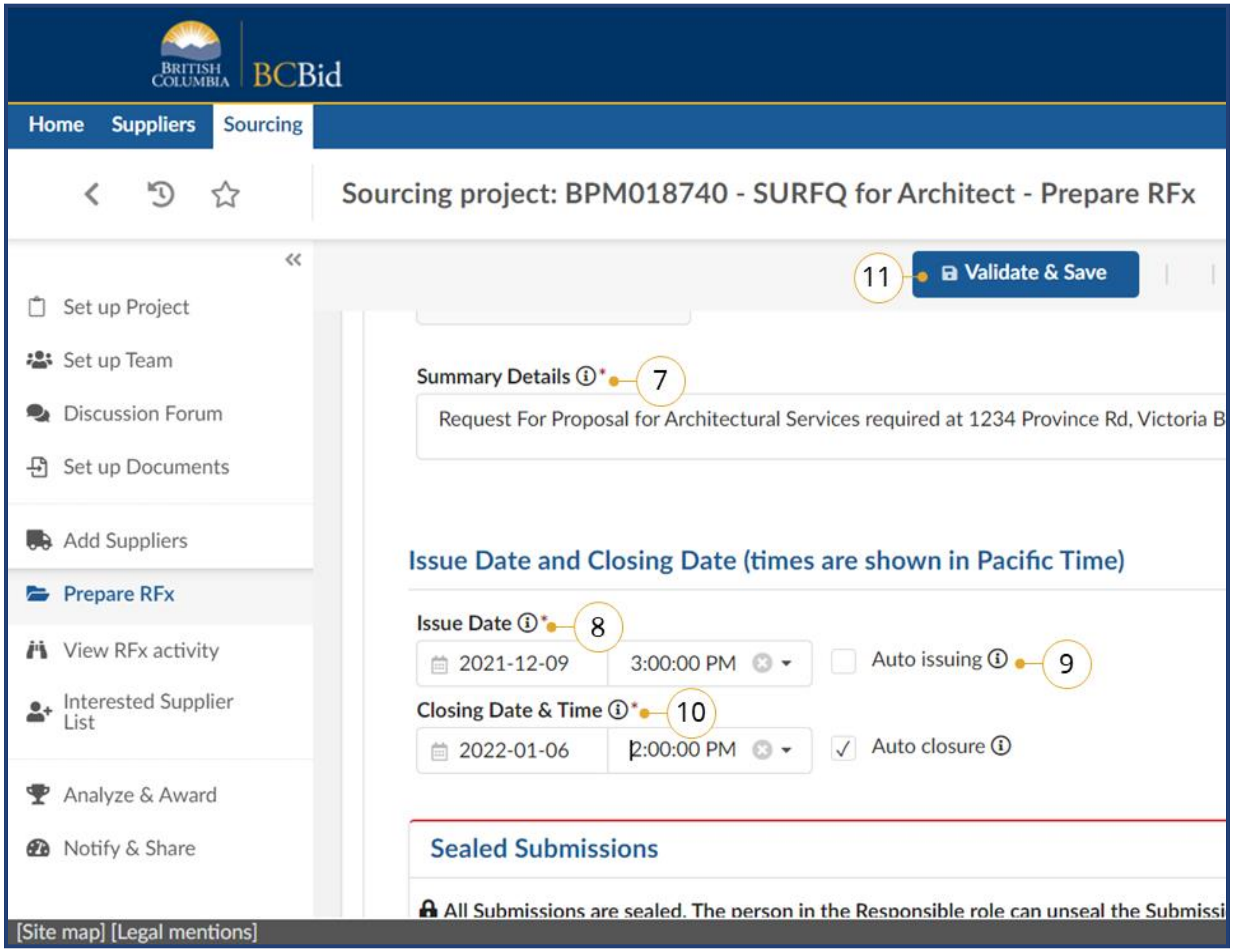
If creating a new Lot, that is not downstream to a Single use Request for Qualifications, see [Create New Lot].



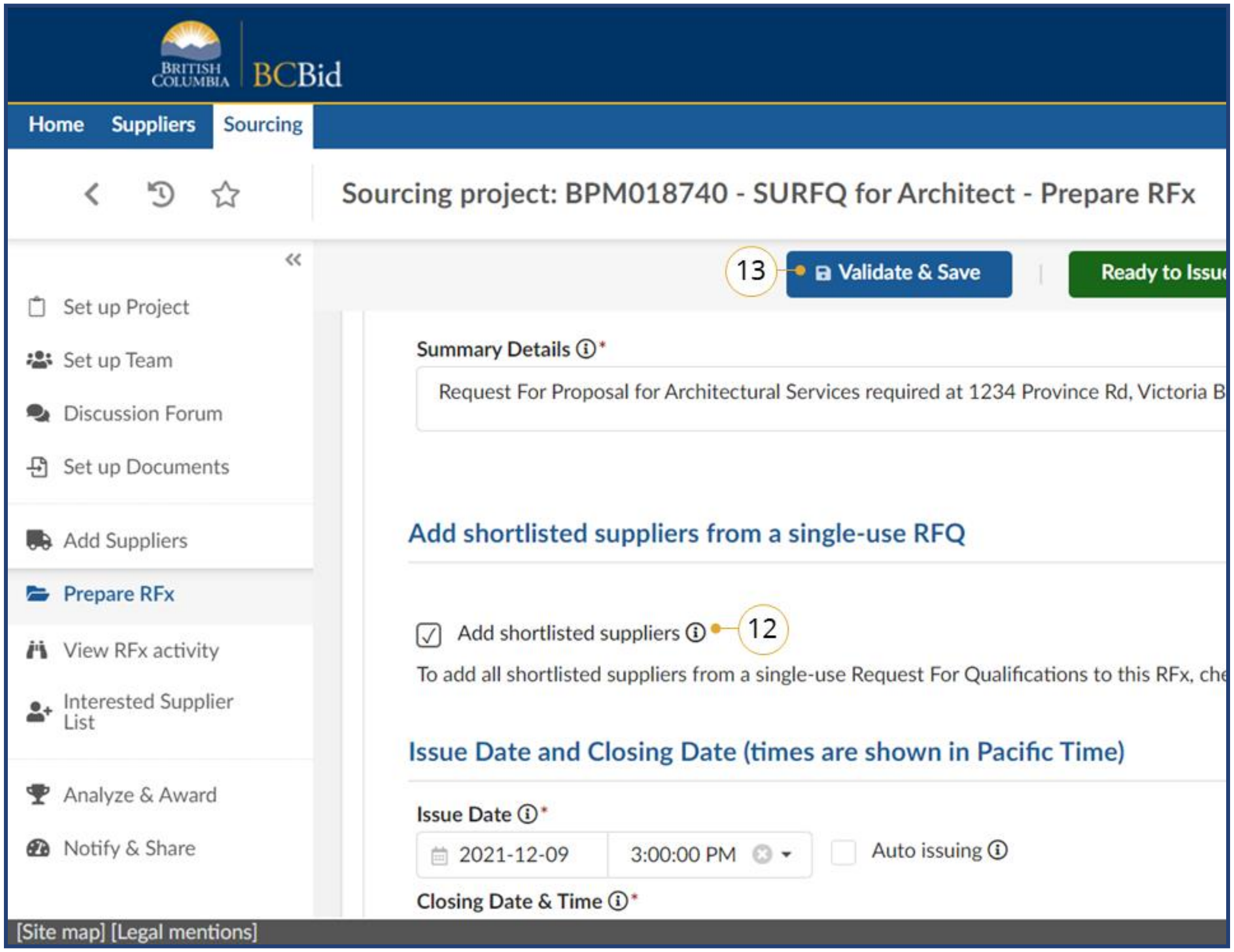
3. In the Create a new Amendment/Lot dialog box, in Copy Options, select the radio button in the **Copy from selected RFx** column.
4. Click **Create & Close**.



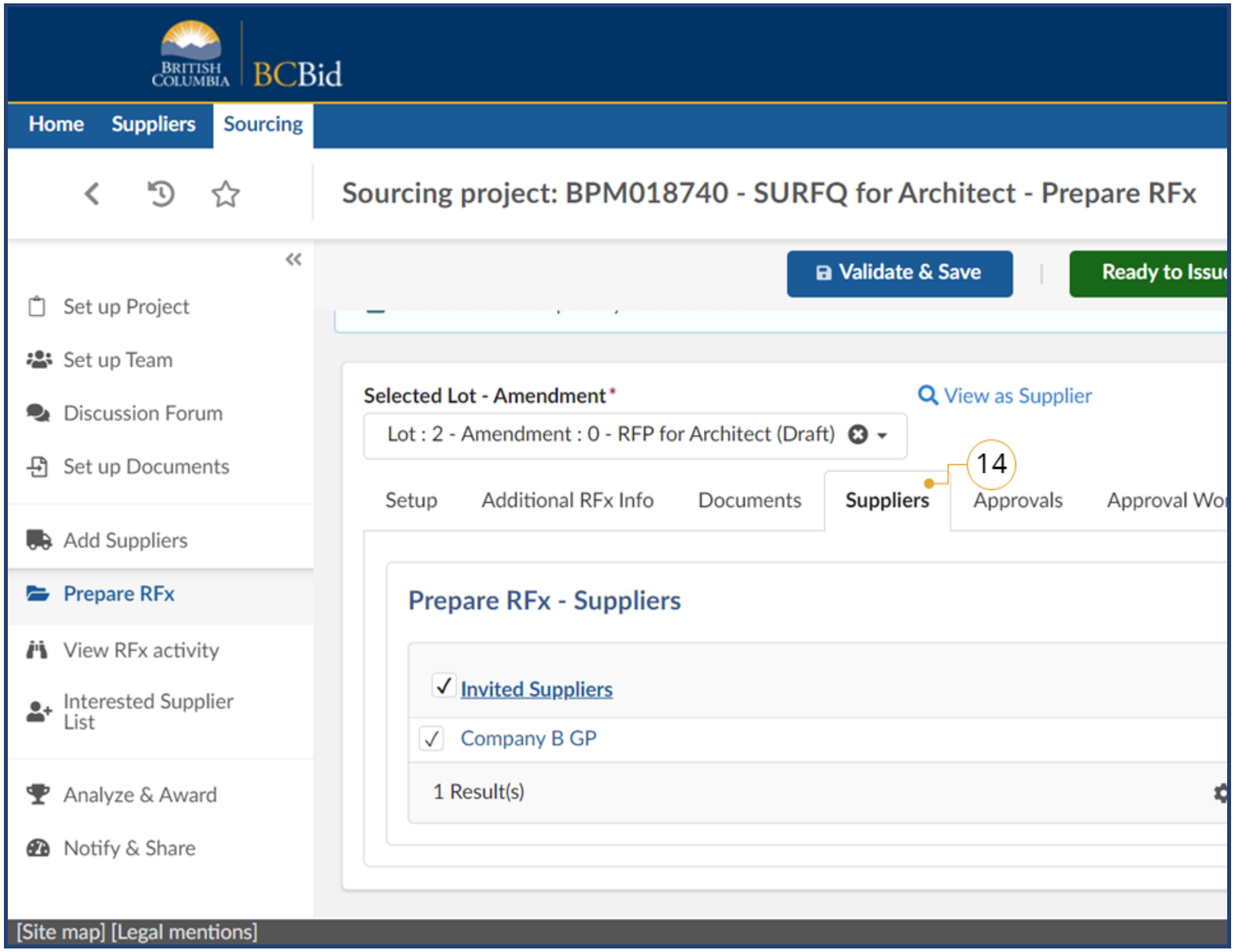
5. In the **Opportunity Type** drop-down list, select the applicable opportunity type for the downstream process.
6. Enter the Opportunity Description.



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**.



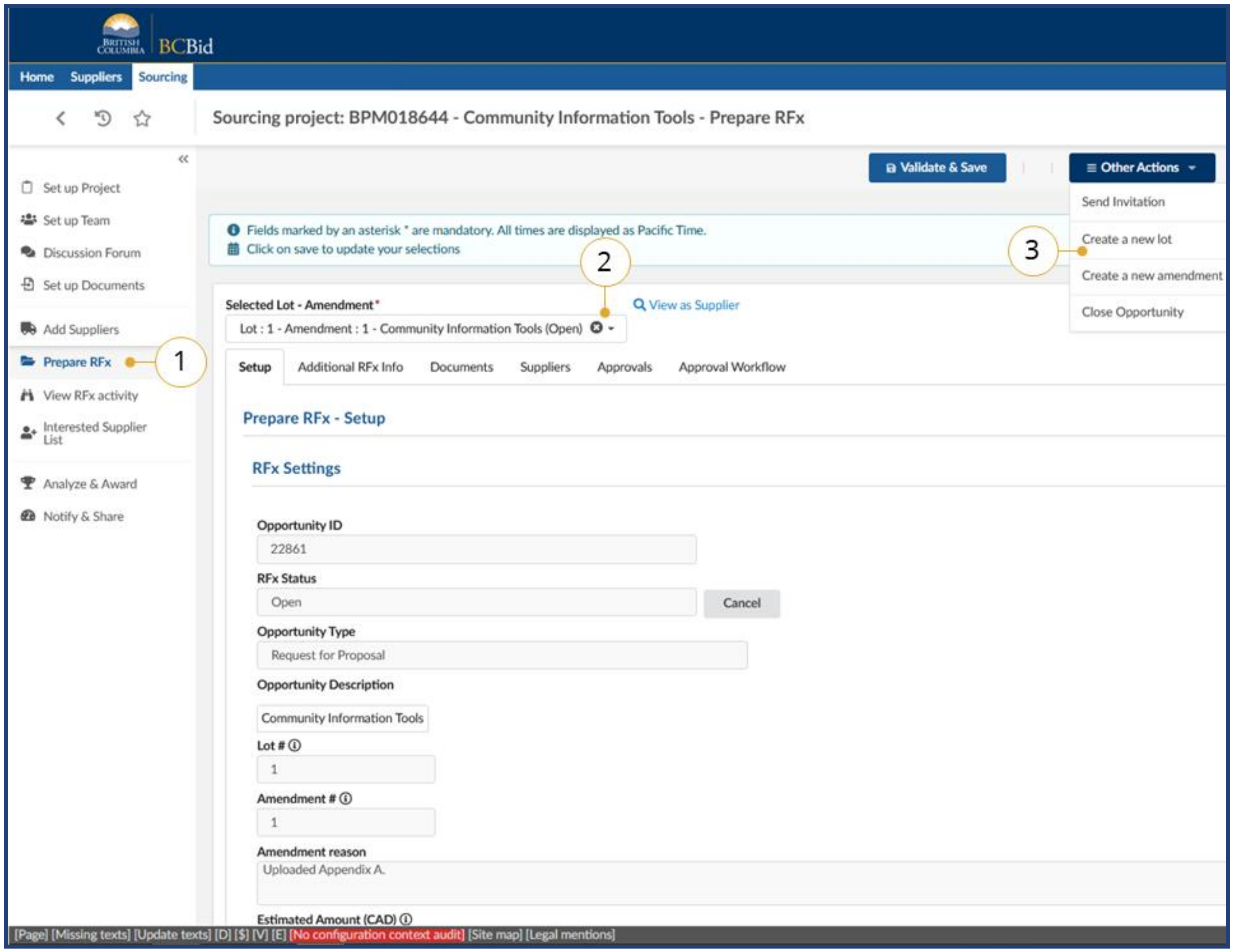
12. Complete any mandatory fields and then select **Add shortlisted suppliers** checkbox.
13. Click **Validate & Save**.



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

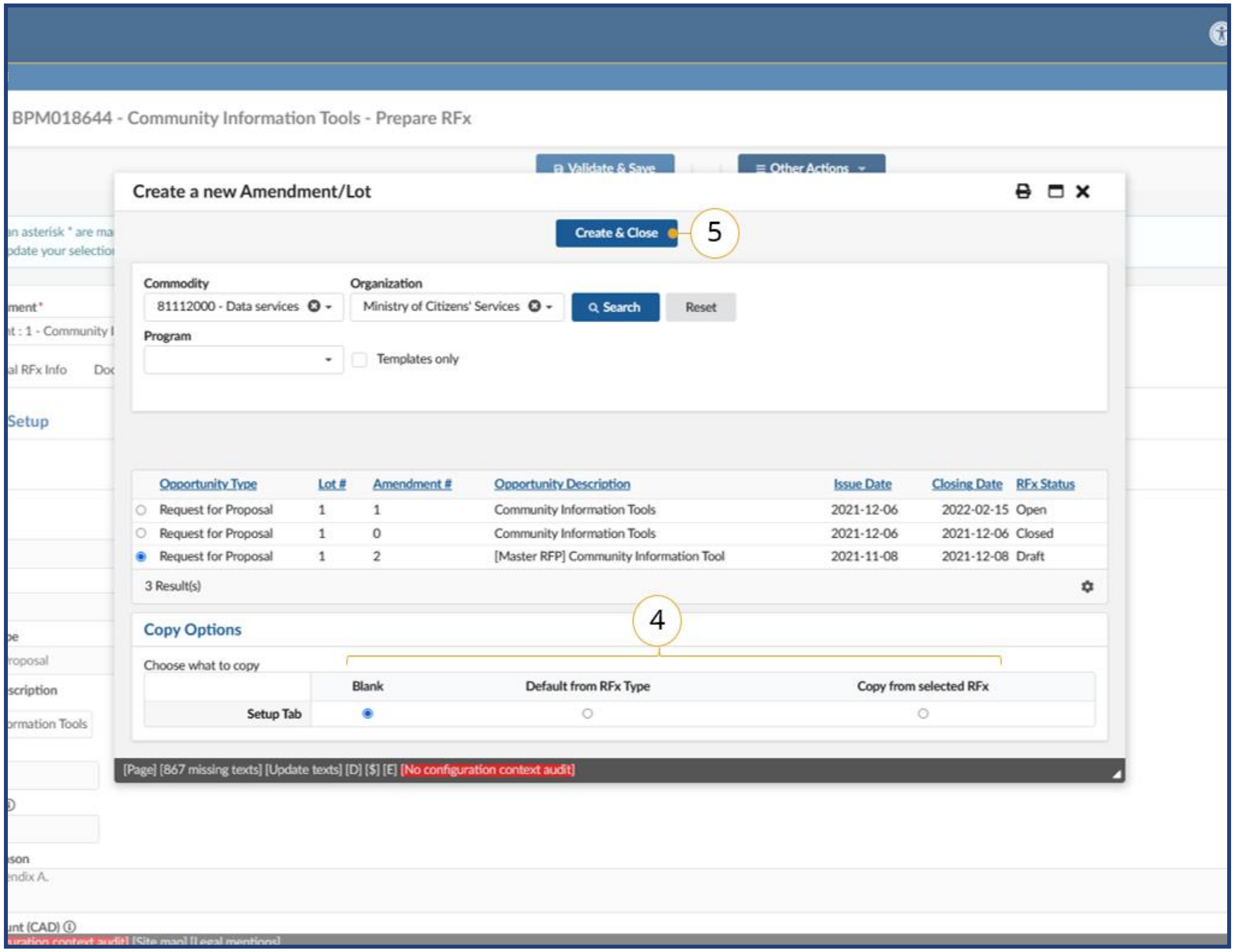
Create New Lot

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.



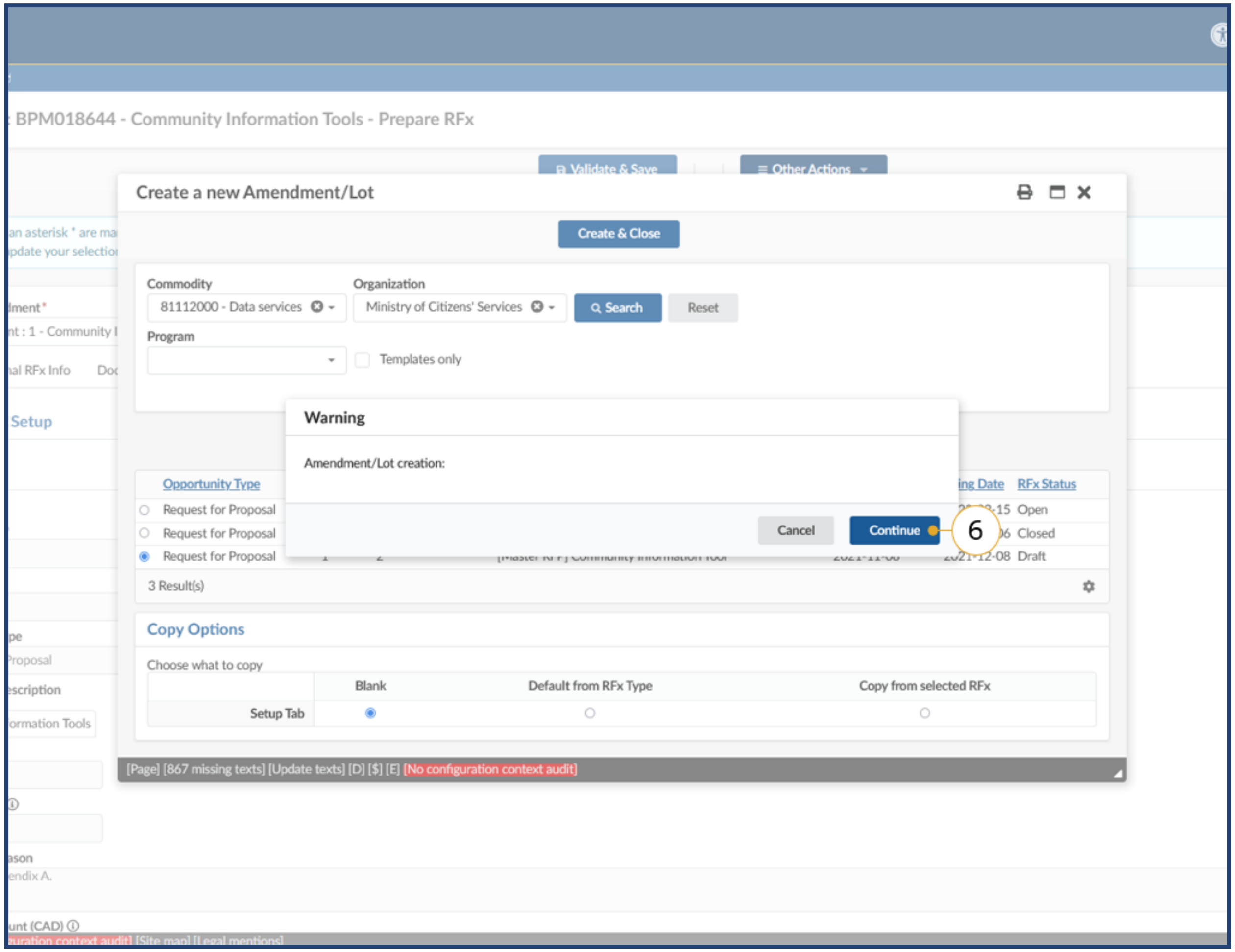
1. In the left-hand menu, click **Prepare RFx**.
2. To toggle between amendments or lots choose the amendment or lot using the **Selected Lot – Amendment** dropdown.
3. Click **Create a new lot**.

[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.

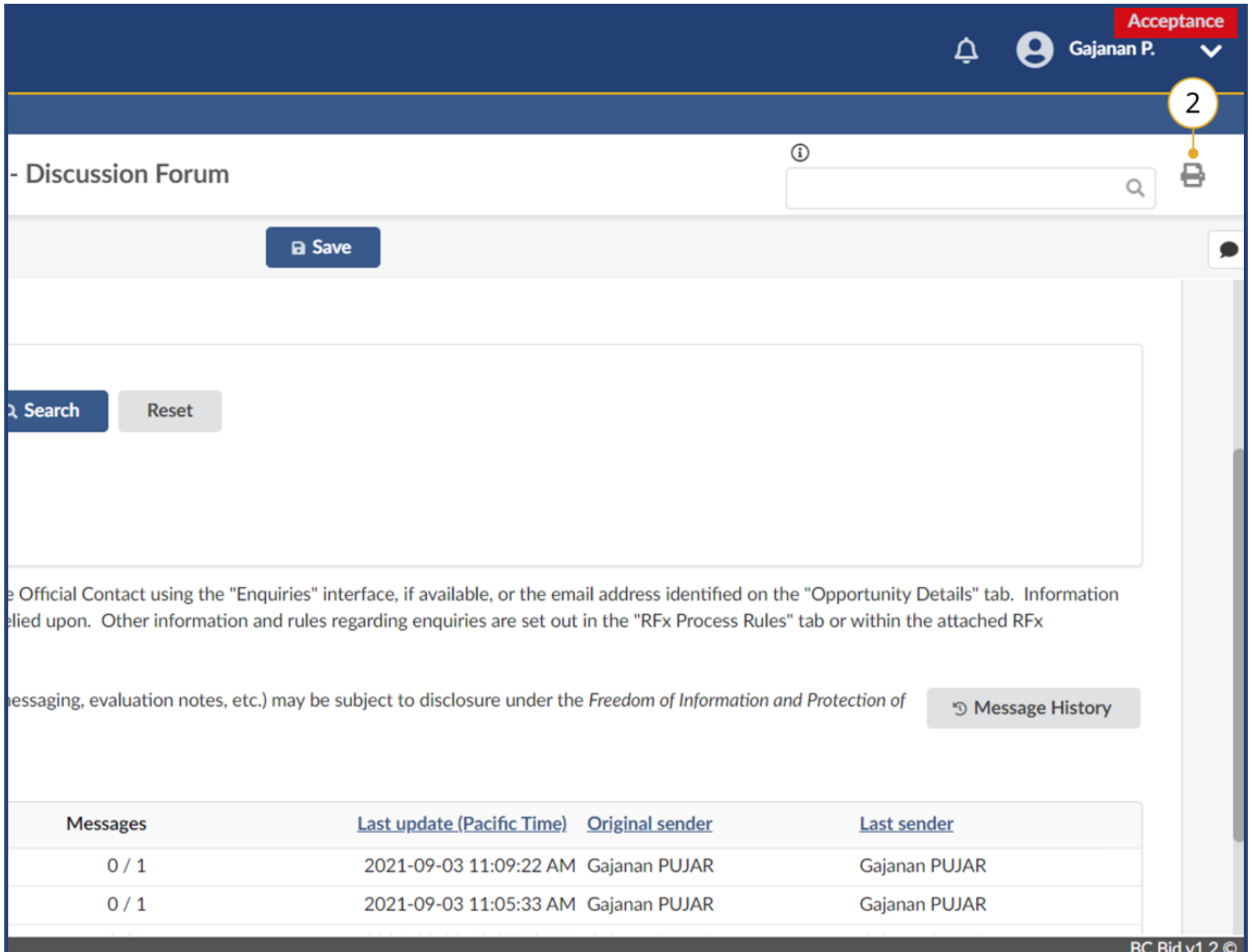


6. Click **Continue**.

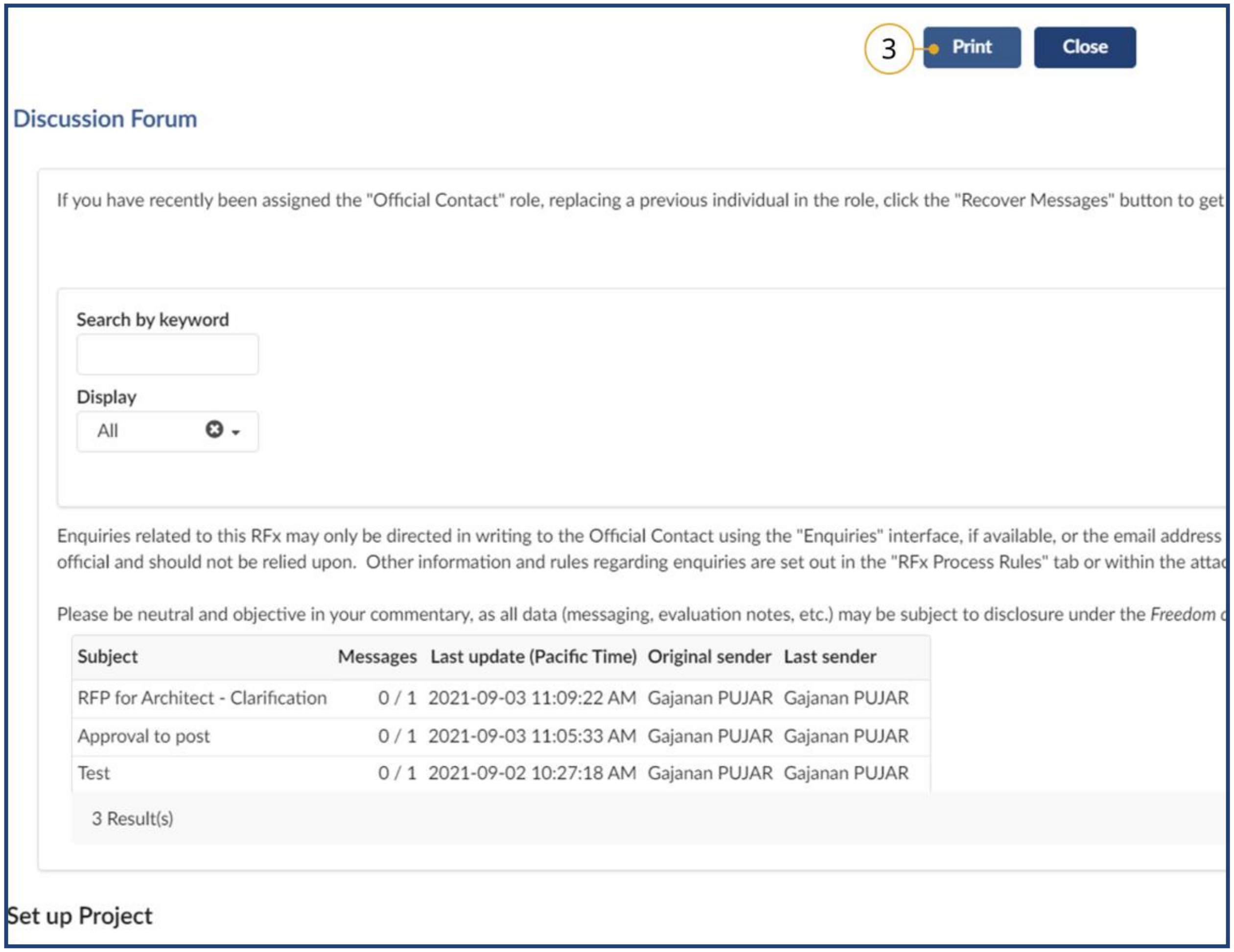
Step 9 – Complete the Opportunity and Project

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.

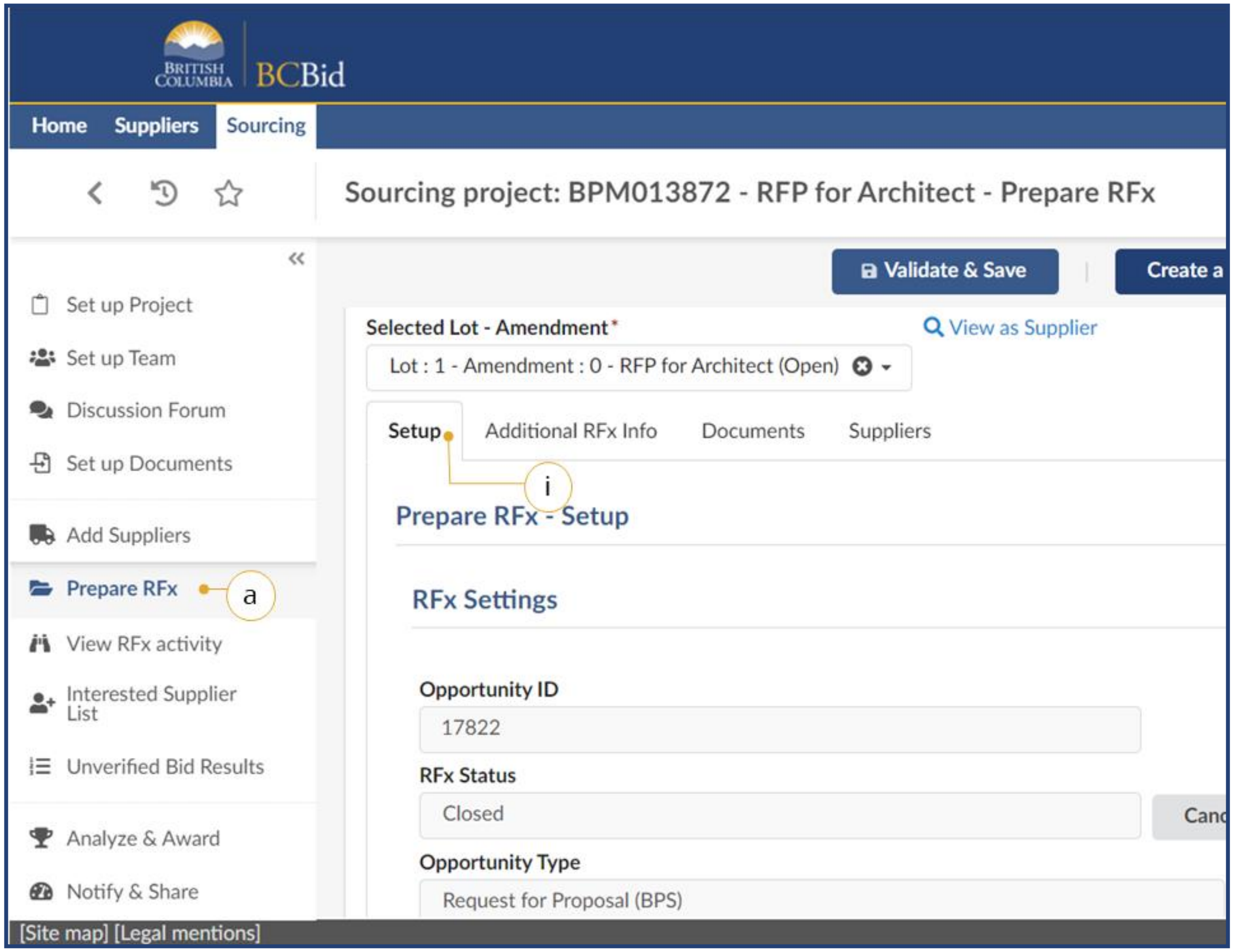


3. Click **Print**.

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

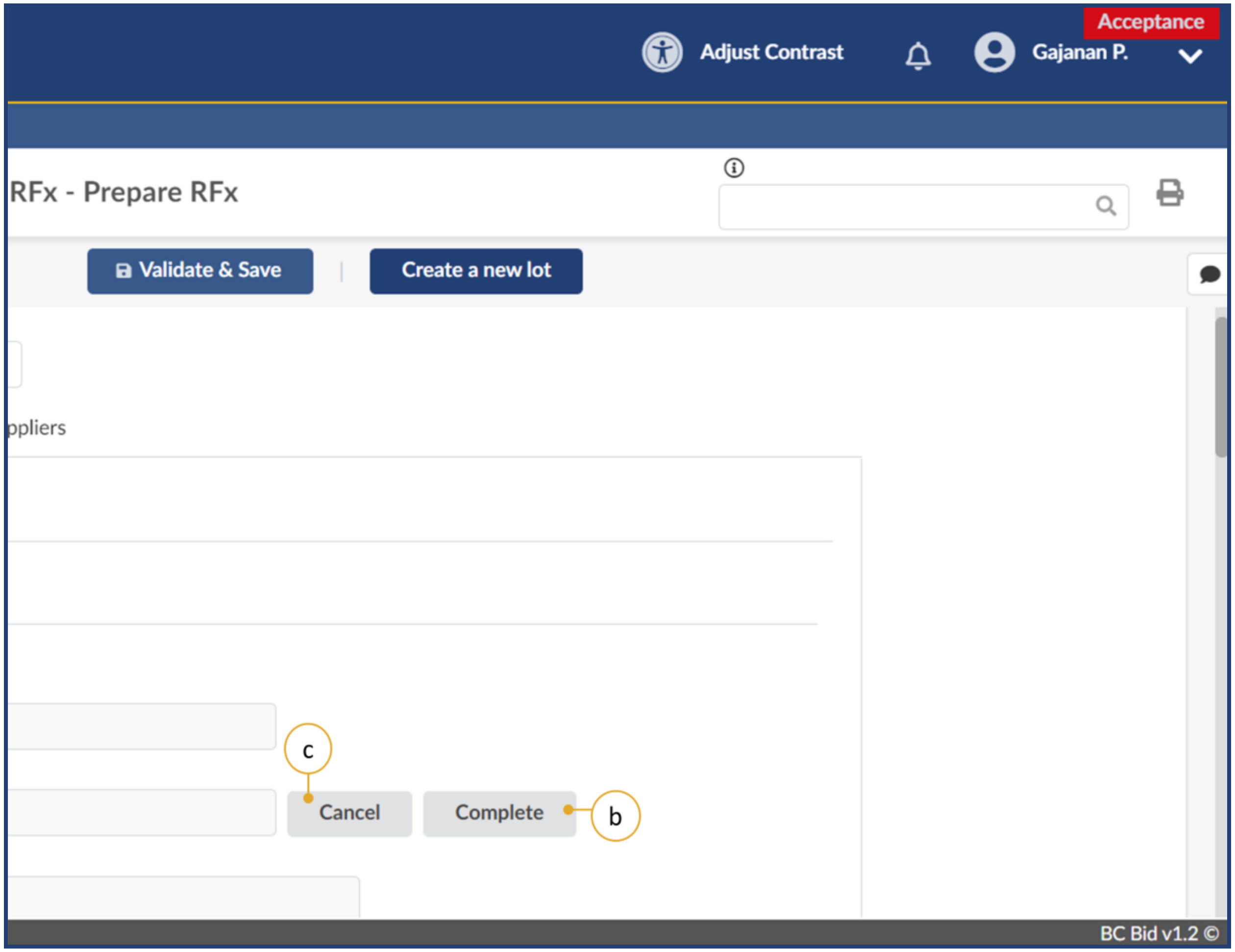
4. In the dialog box, select the appropriate print settings and click **Print**.

End Opportunity



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

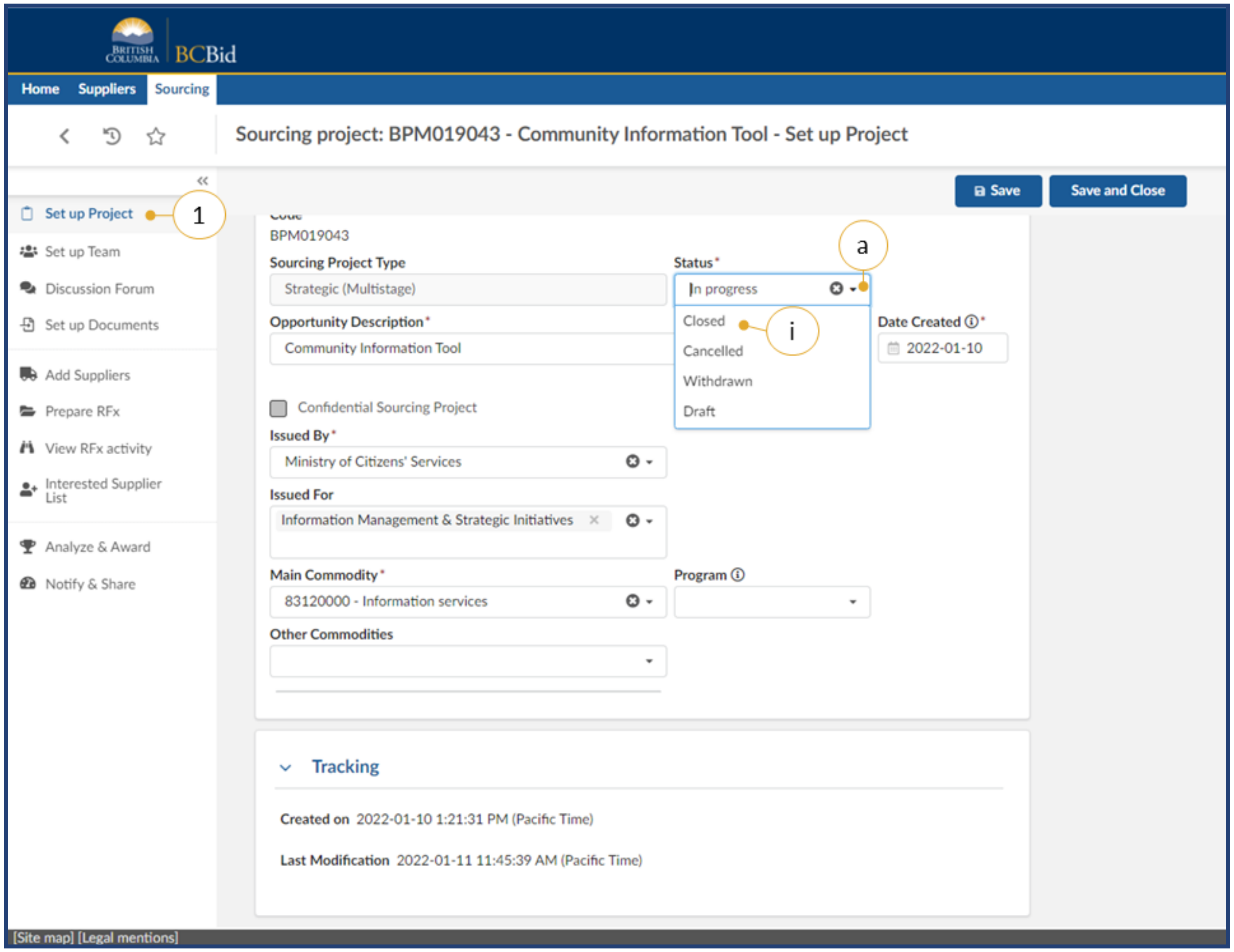
 [Closeout an Opportunity](#)



b. Click **Complete** to change the Opportunity Status from Closed to Completed.
c. Click **Cancel** to change the Opportuntiy 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.

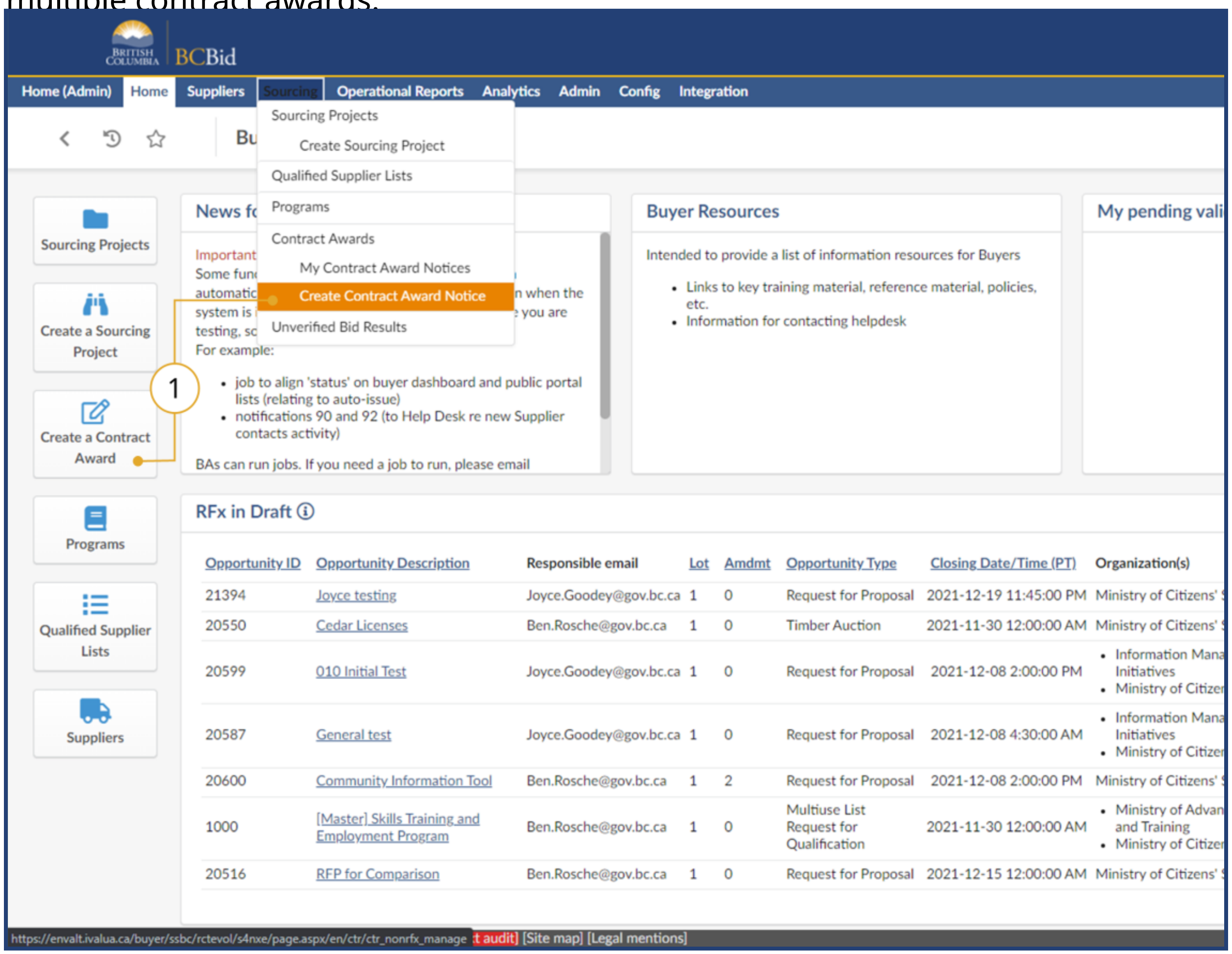
[Closeout a Sourcing Project]

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

Special Considerations

Contract Award Notice Webform

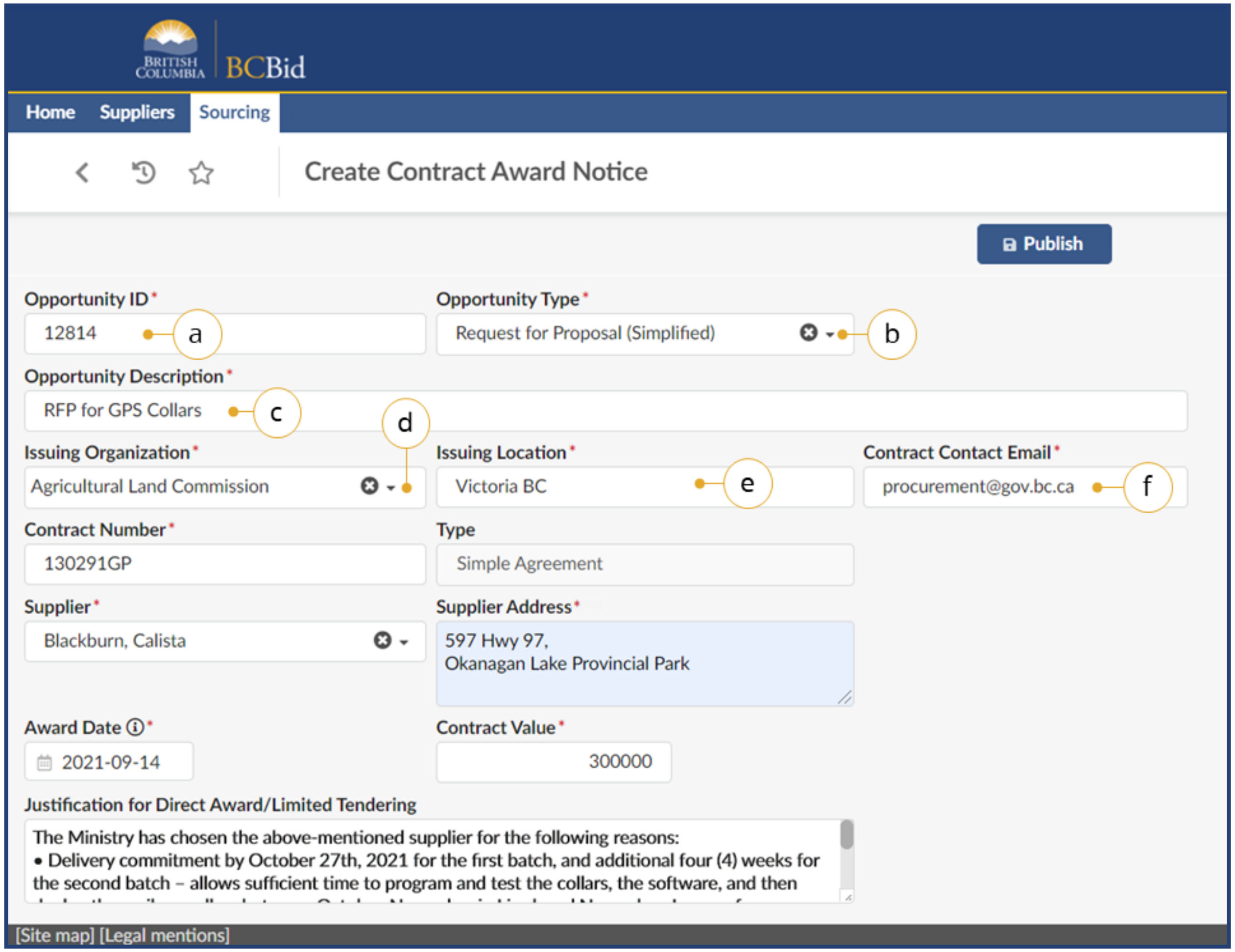
Buyers must use the Contract Award Notice Webform for all direct awards, excluding direct awards awarded through the Notice of Intent (NOI) process. The Contract Award Notice webform is used for any purchases from a standing arrangement, standing offer or other form of direct selection. Additionally,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



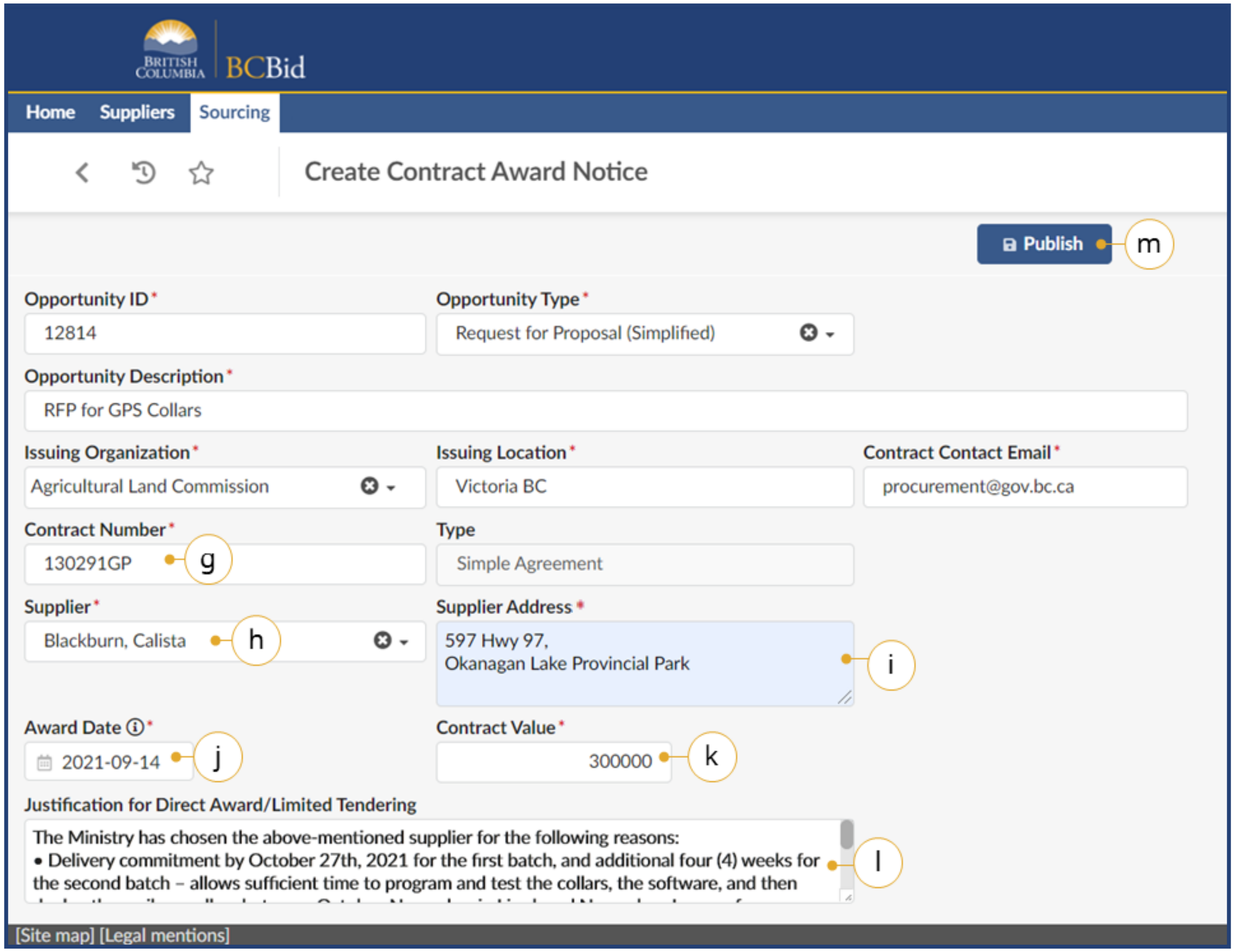
1. In the Quick Access menu, click **Create a Contract Award** or click **Sourcing** in the main menu, then click **Create Contract Award Notice**.

[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.

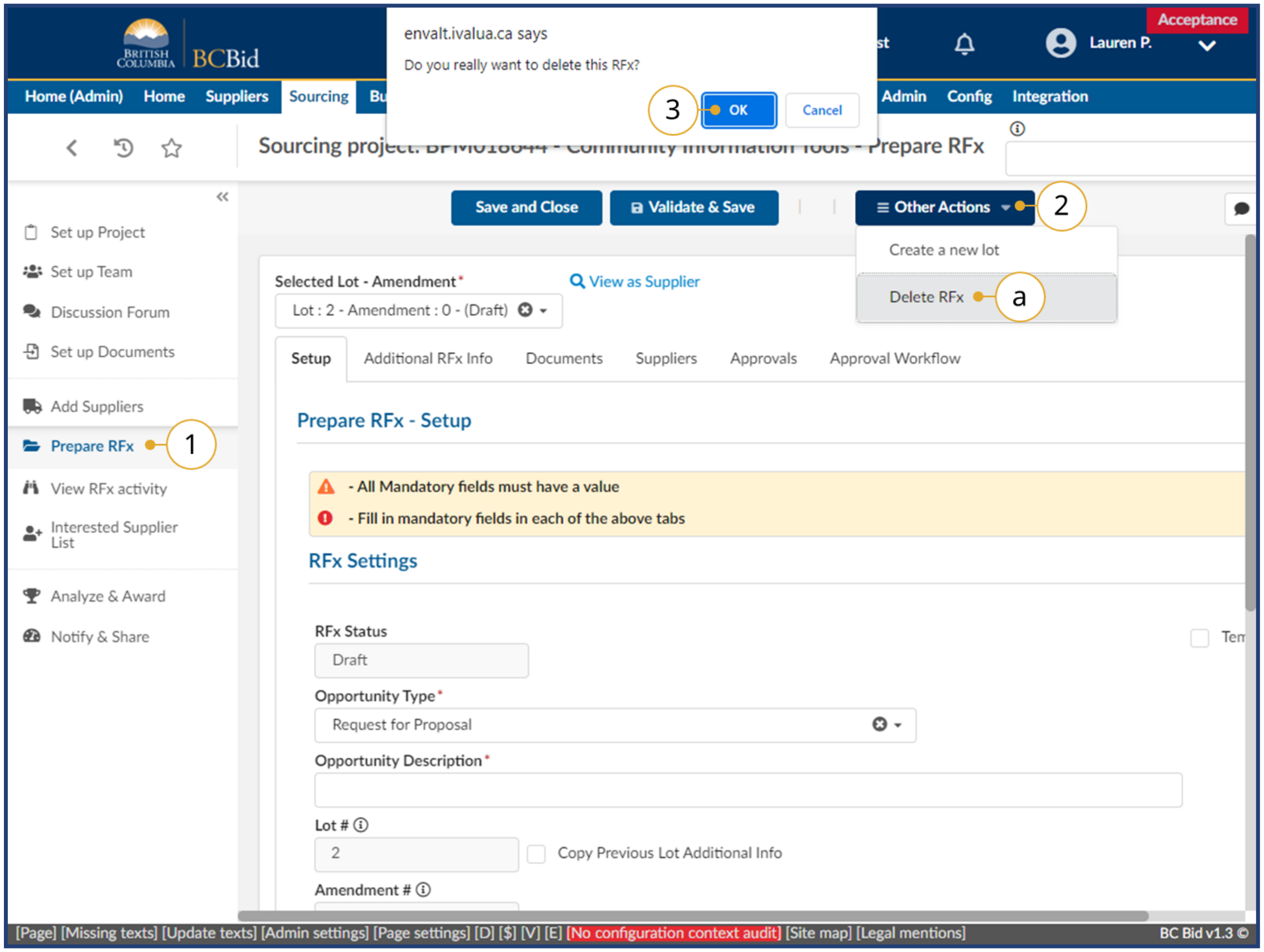


2. In the dialog box, complete the following fields:
   a. Enter the **Opportunity ID**.
   b. Select the **Opportunity Type**.
   c. Enter the **Opportunity Description**.
   d. Select the **Issuing Organization**.
   e. Enter the **Issuing Location**. Issuing Location must be a complete address.
   f. Enter the **Contract Contact Email**.



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**.

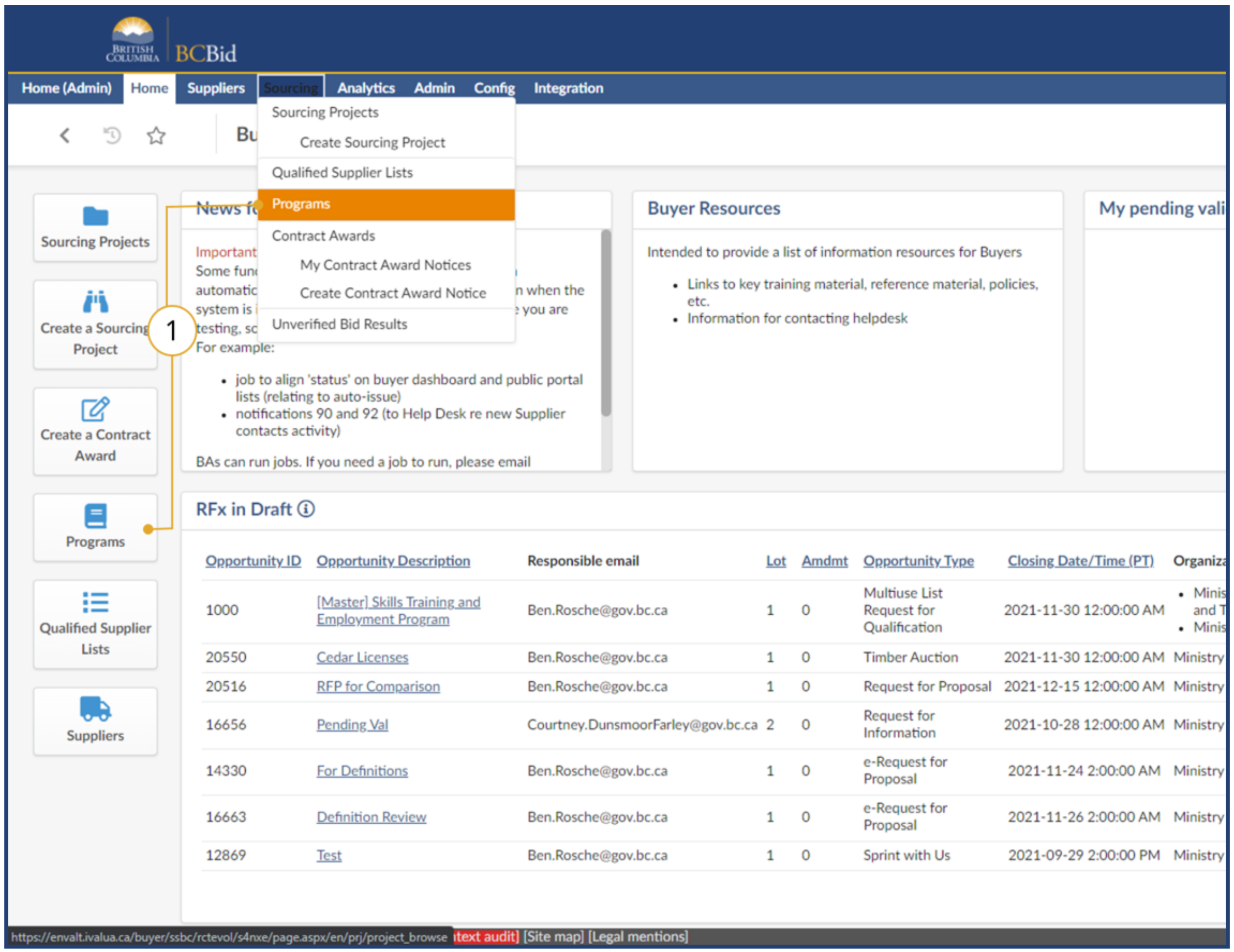
Delete a Draft Opportunity (RFx)



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

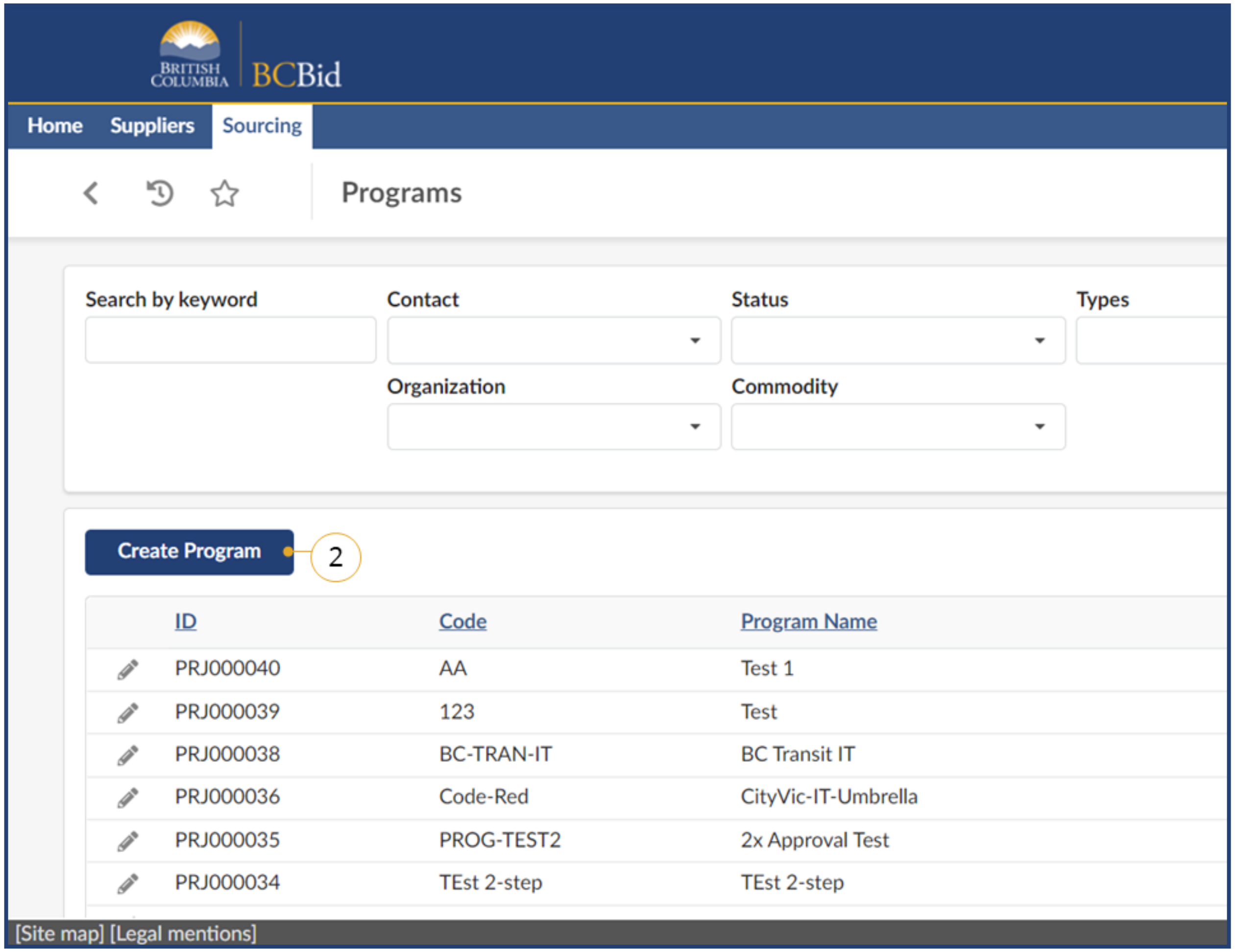
Programs are document storage repositories grouping a suite of Sourcing Projects under a single umbrella. You can set up and link programs to your opportunities by selecting the appropriate program from the Programs drop-down list. Documents available under a program will be accessible to the sourcing 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.

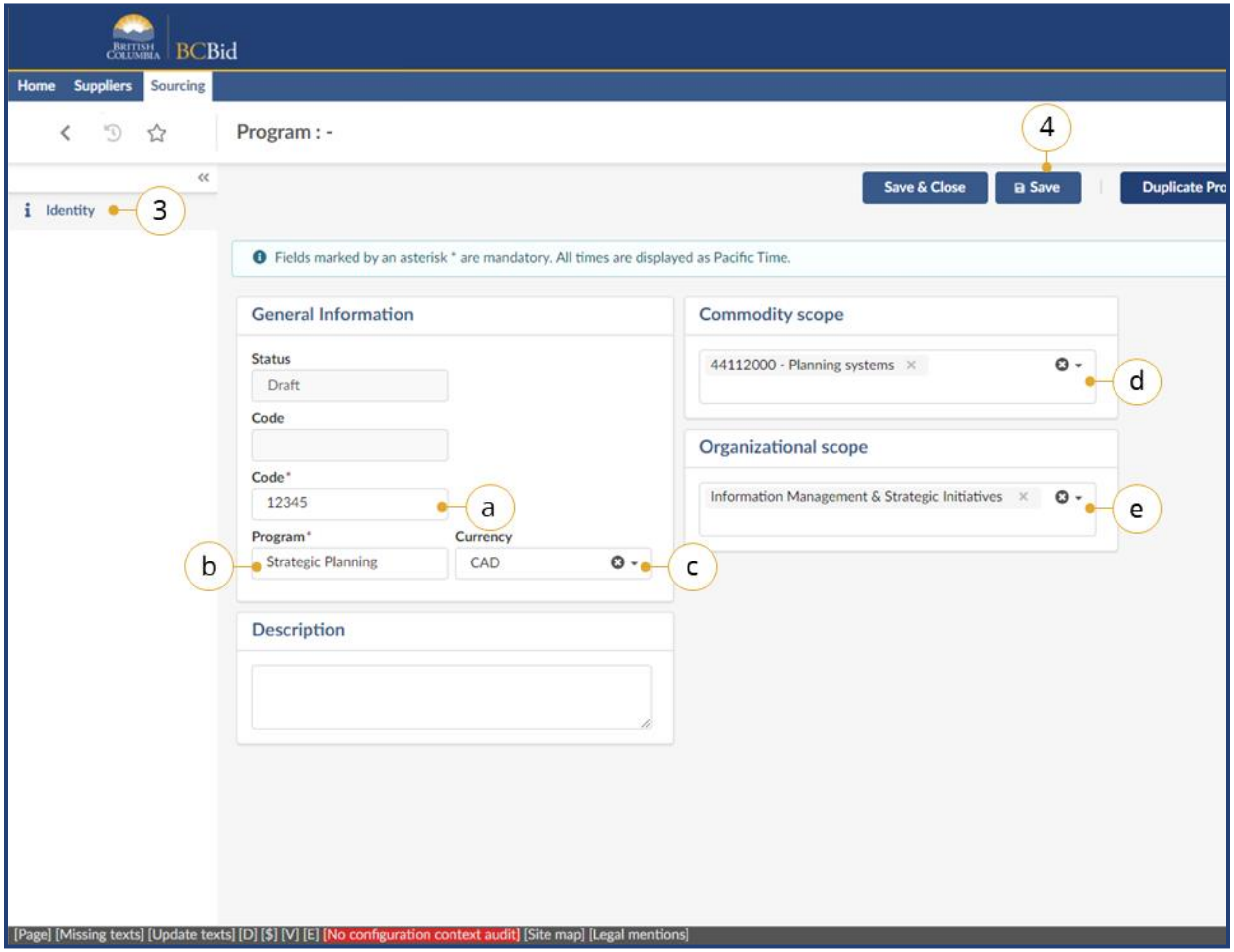
[How to create a Program]()

Create a Program



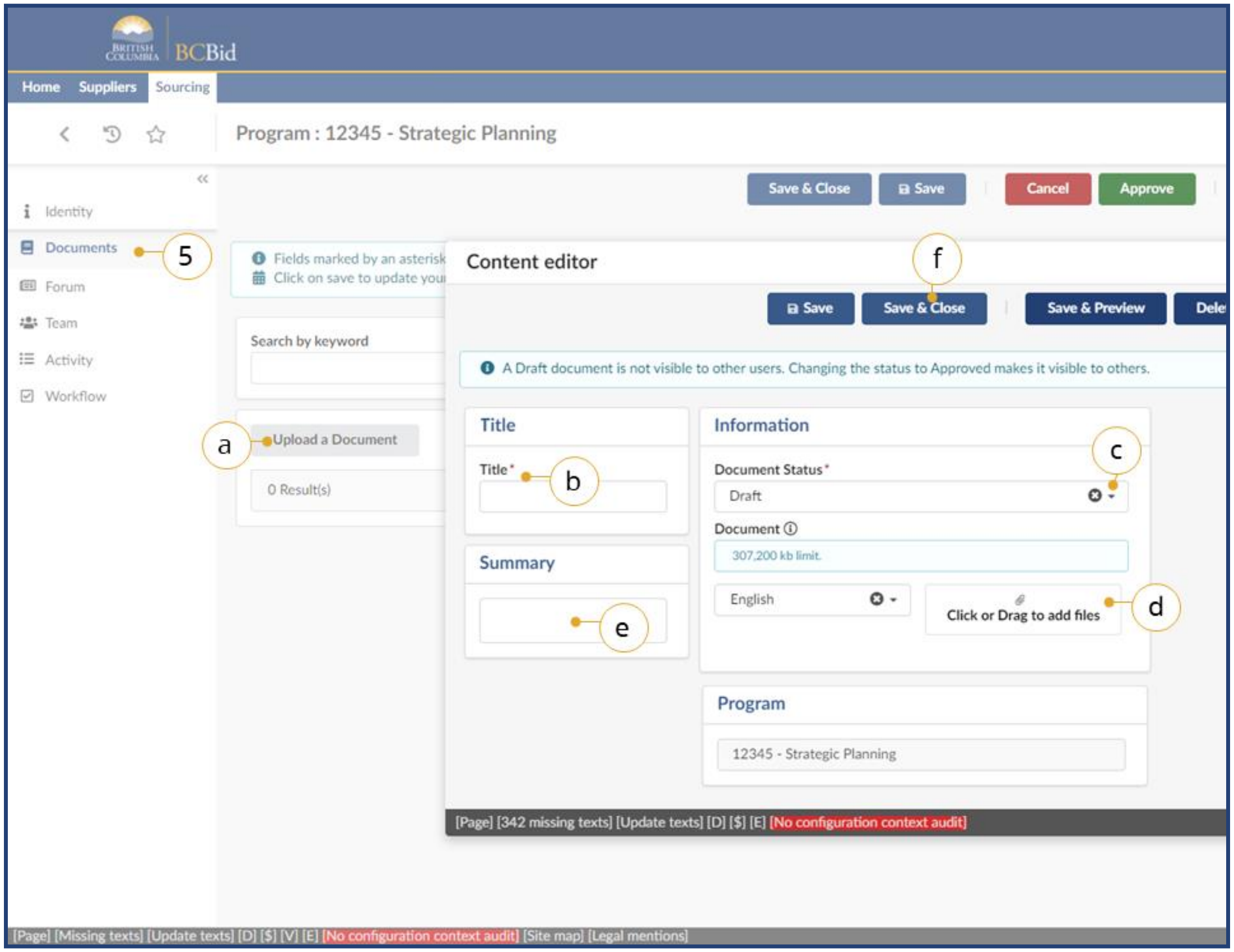
2. Click **Create Program**.

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

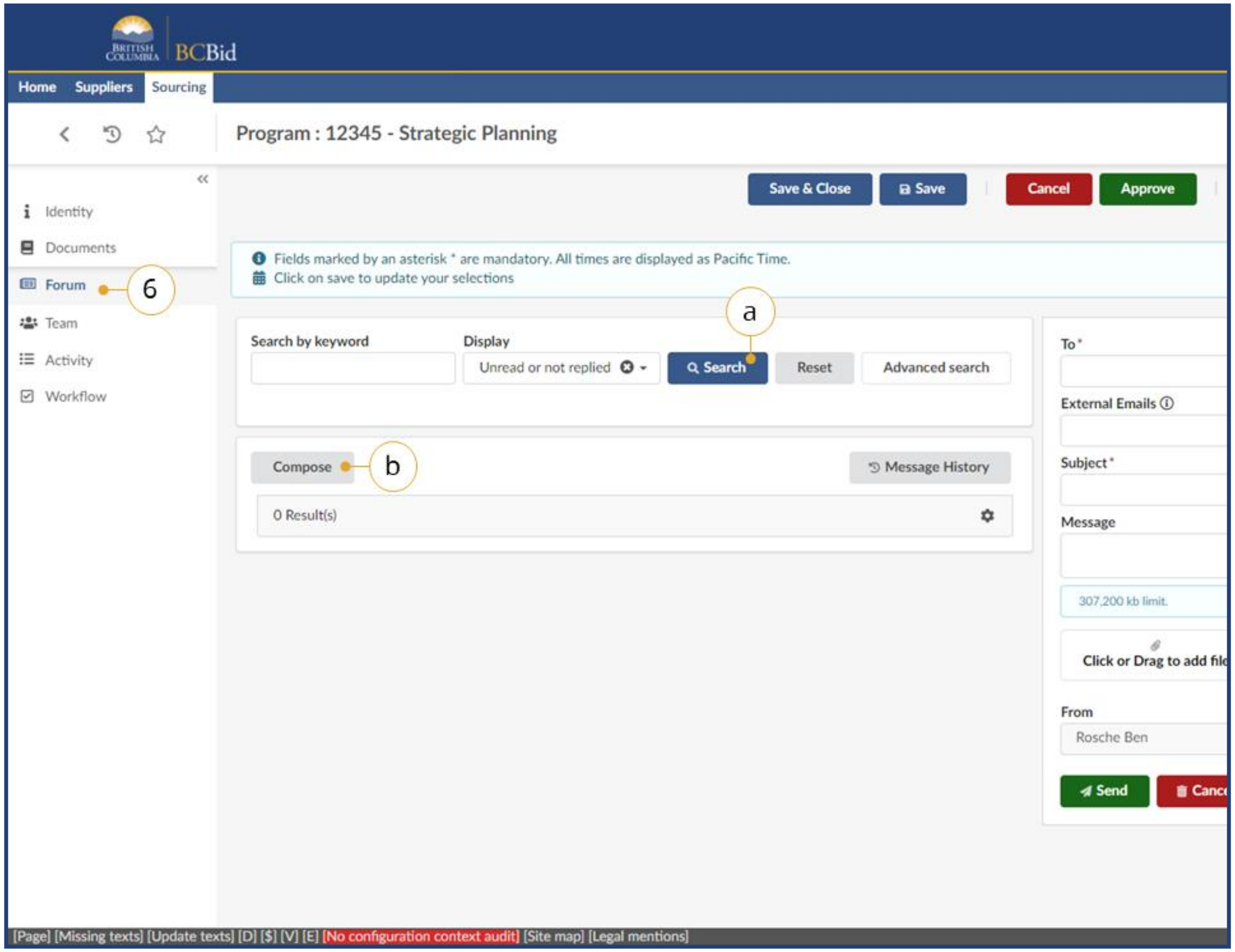


3. On the **Identity** tab, complete the following textboxes:
   a. In the **Code** textbox, insert a code that identifies the Program. The code cannot have spaces in between or after characters
   b. In the **Program** textbox, insert a Program name.
   c. *Optional*: In the **Description** textbox, 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**.

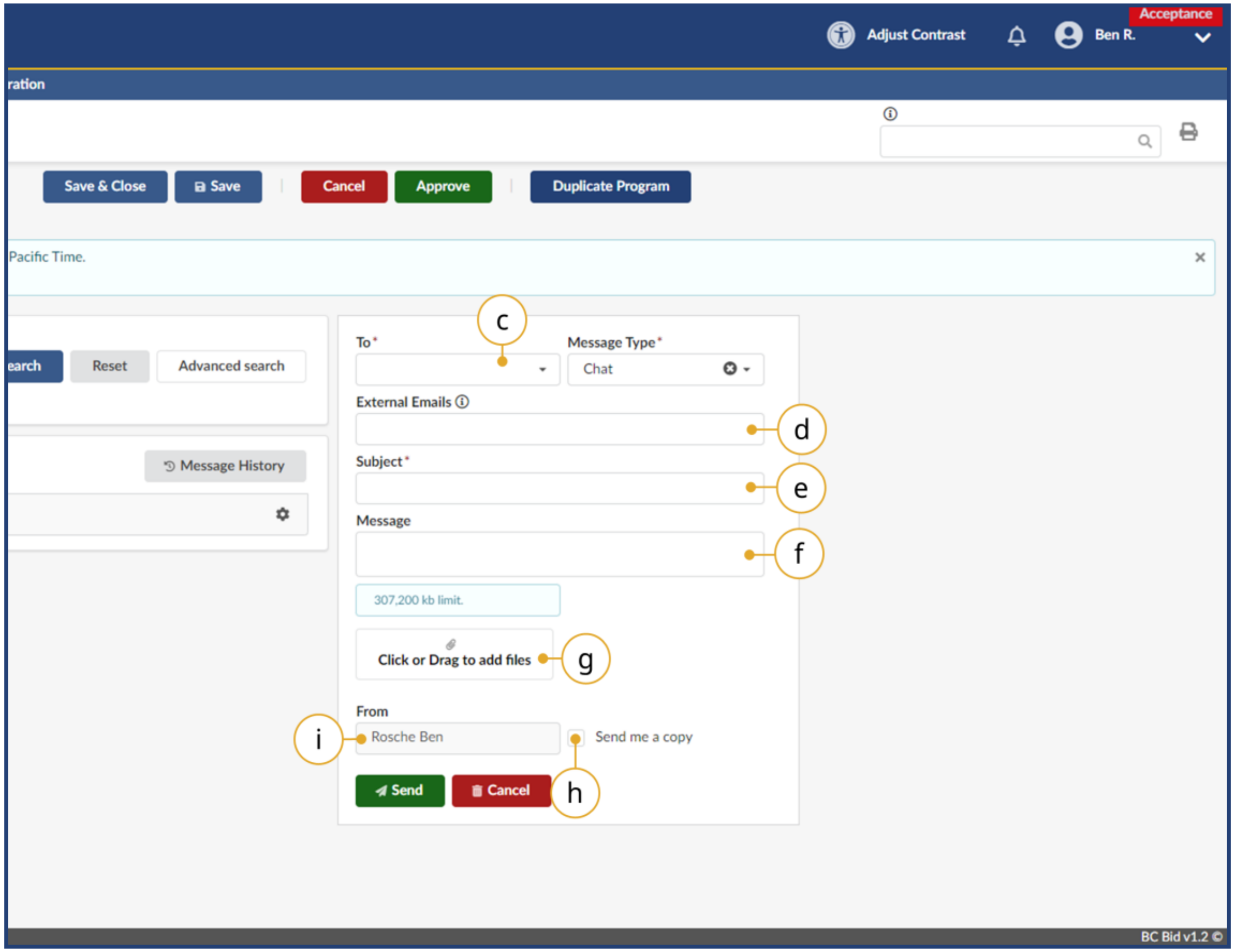
Code is a unique identifier of the Program and in the Program text box. Users should enter a label name specific to their organization.
The only Currency available is CAD.



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**.

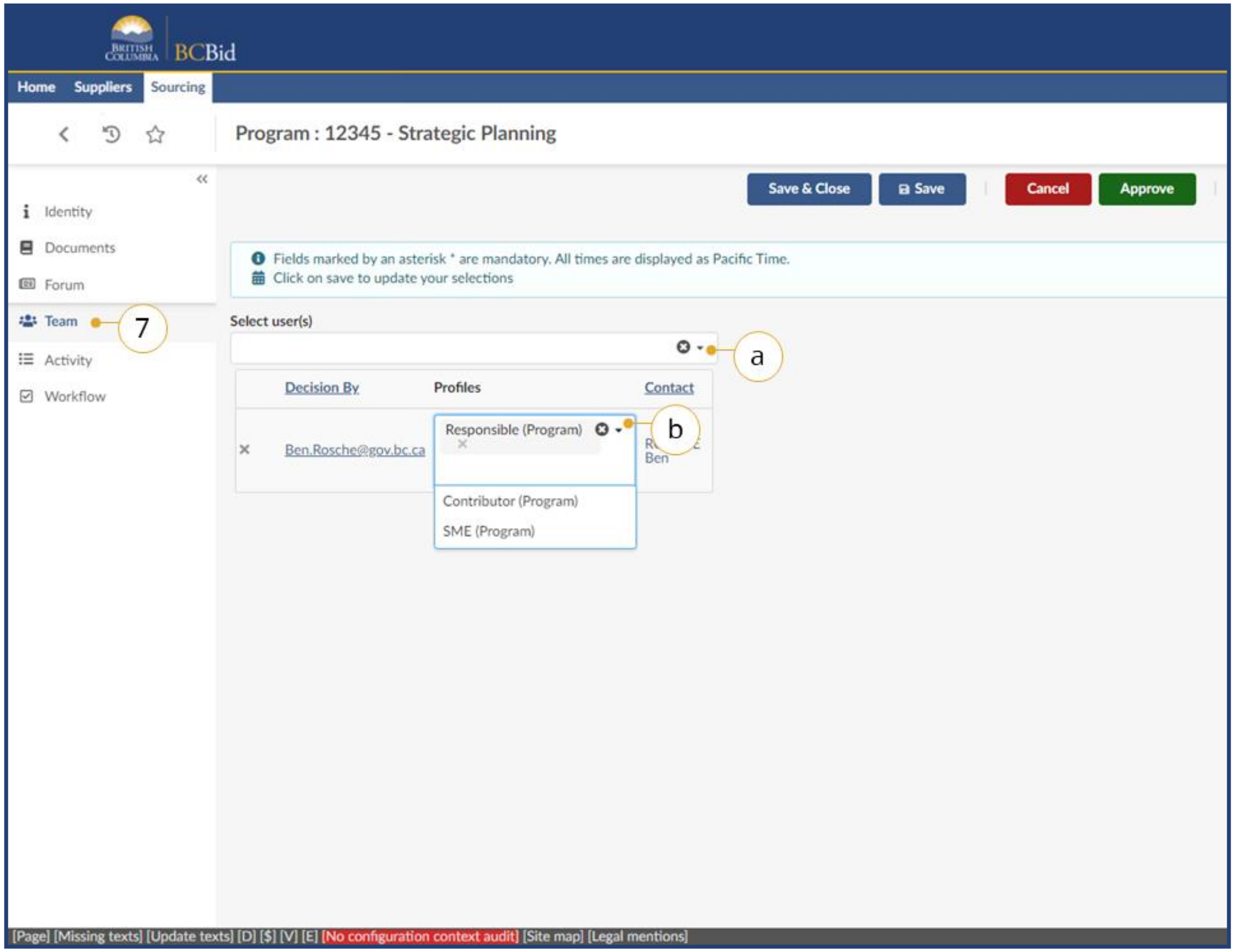


6. *Optional*: Navigate to the **Forum** tab.
    a. Use the search filter to filter messages.
    b. Select **Compose** to create a new message.

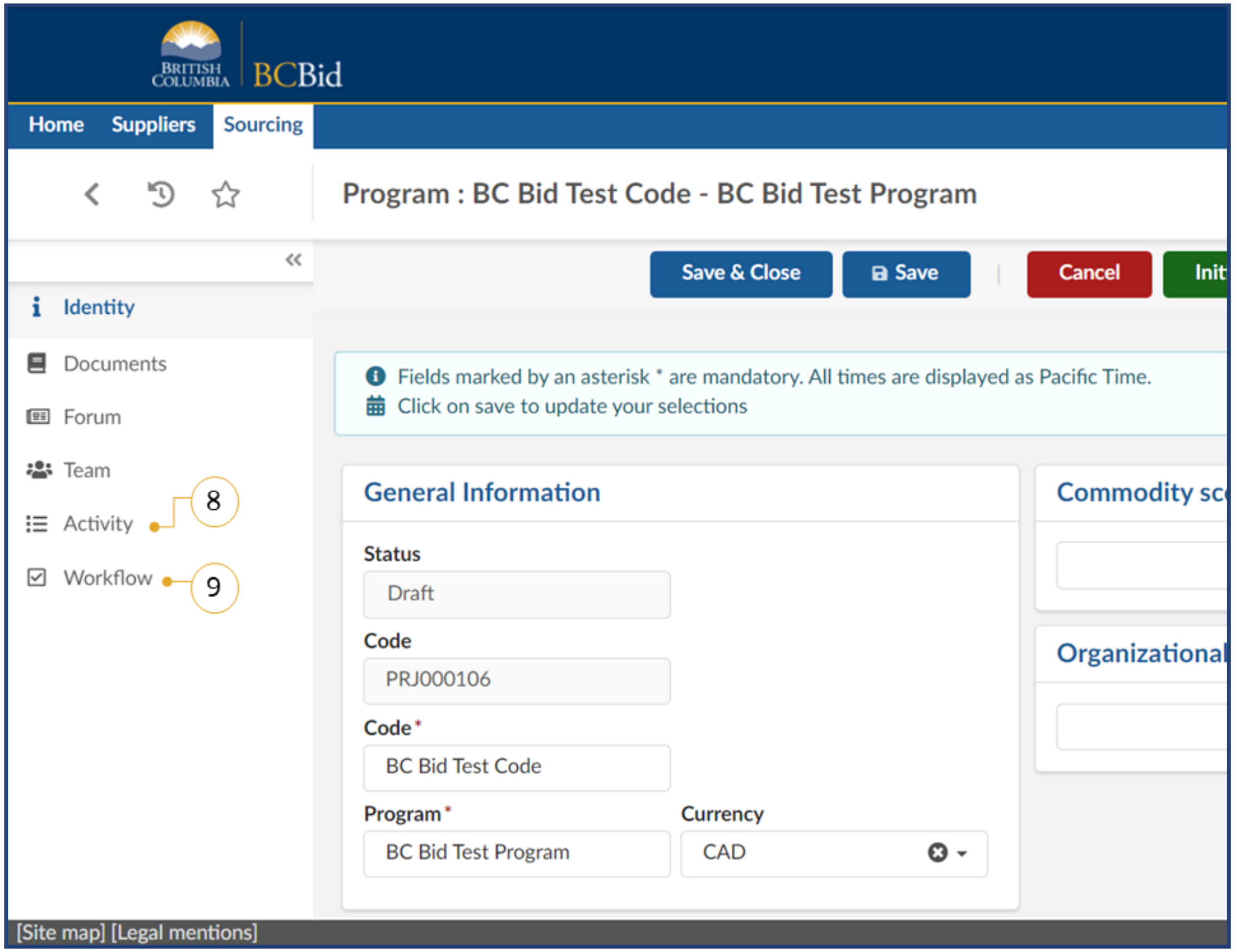


c. Use the **To** drop-down list to select one or multiple recipients.
d. *Optional:* In the **External Emails** textbox, insert the email address of one or multiple external recipients.
e. In the **Subject** textbox insert a subject.
f. *Optional:* In the **Message** textbox insert a message
g. *Optional:* 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**.

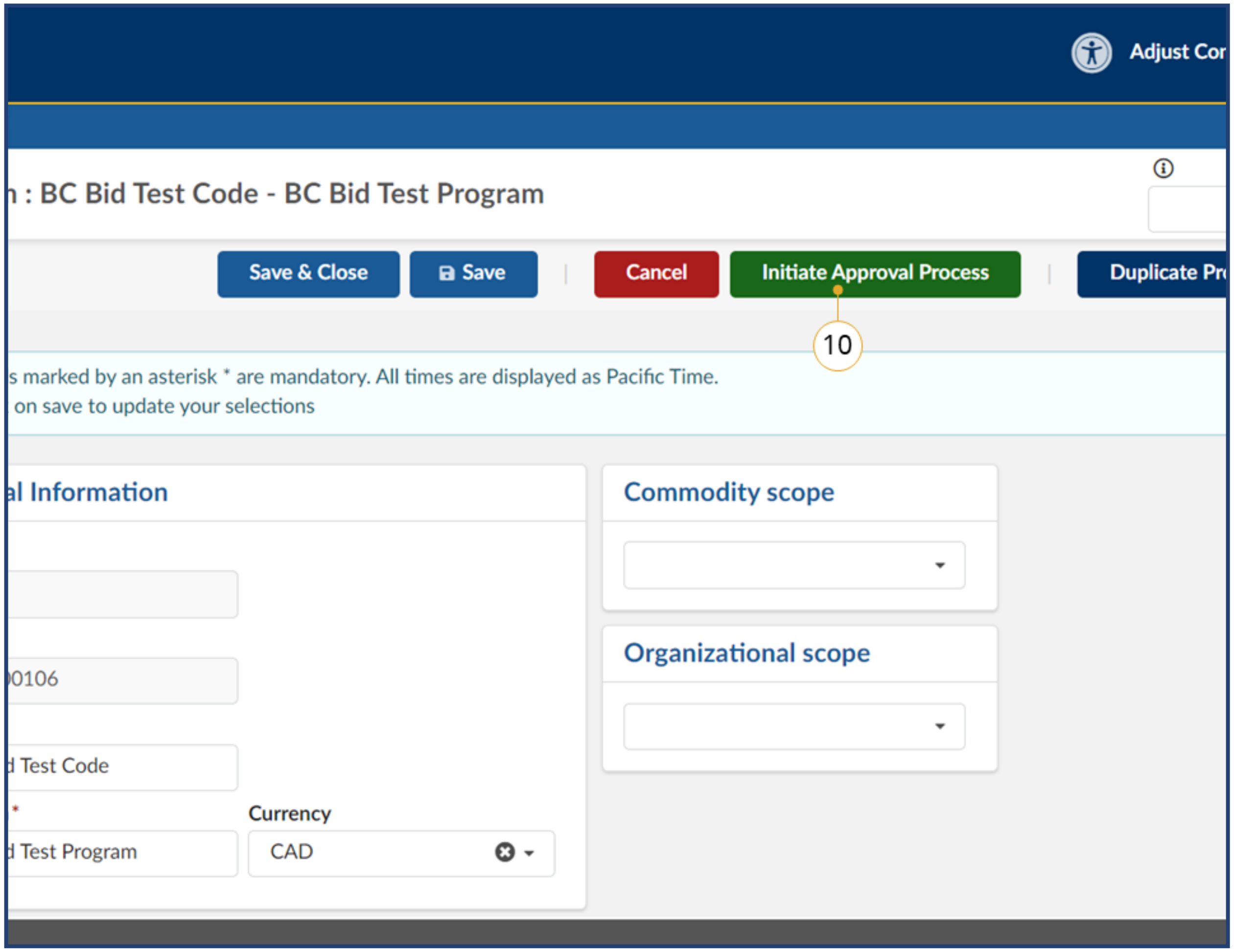
Files that are attached to BC Bid messages are only available within BC Bid and will not appear in the external email notification.



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.

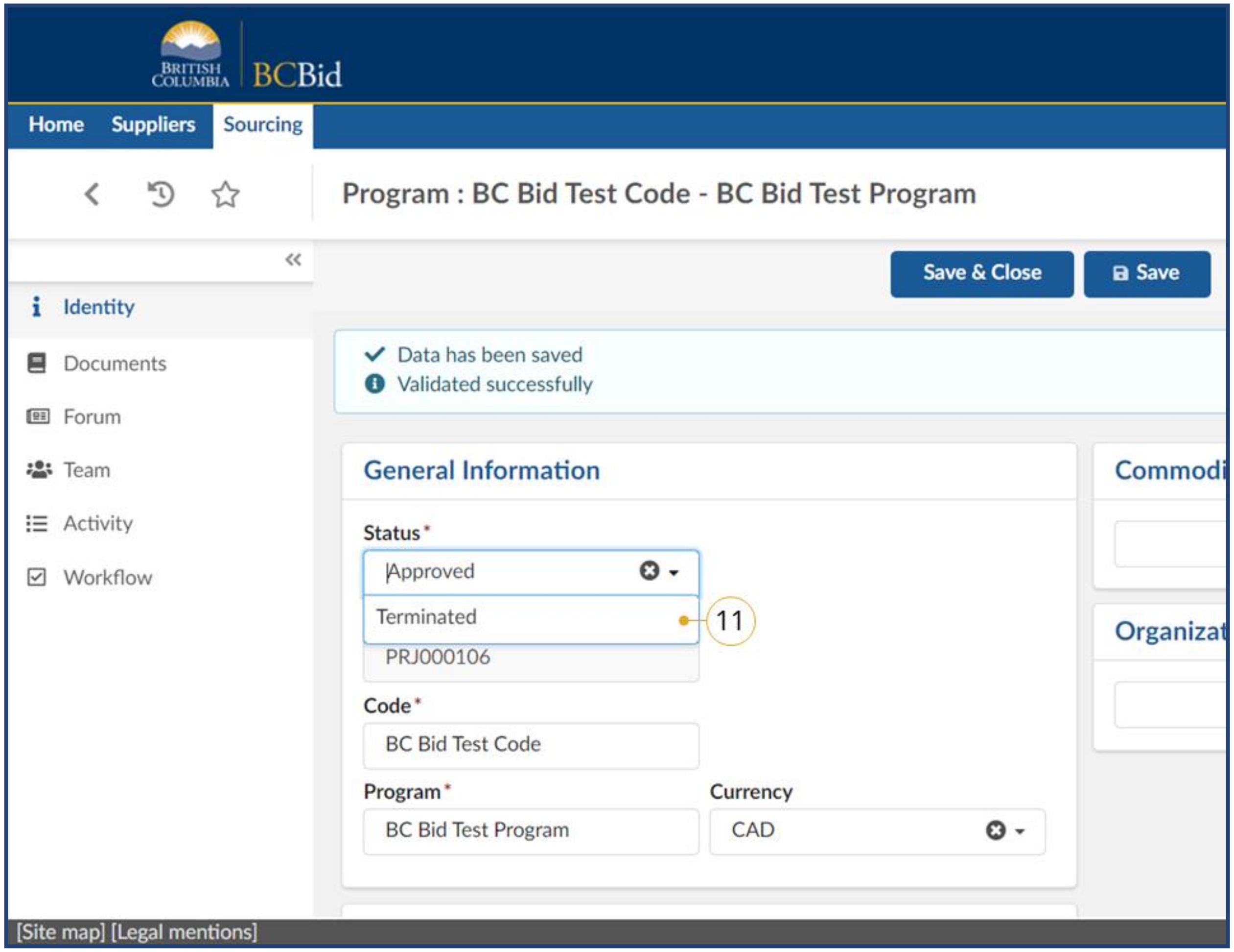


8. *Optional*: Use the **Activity** menu to track opportunities linked to the program.
9. *Optional*: Click the **Workflow** menu to see the actual workflow.



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

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

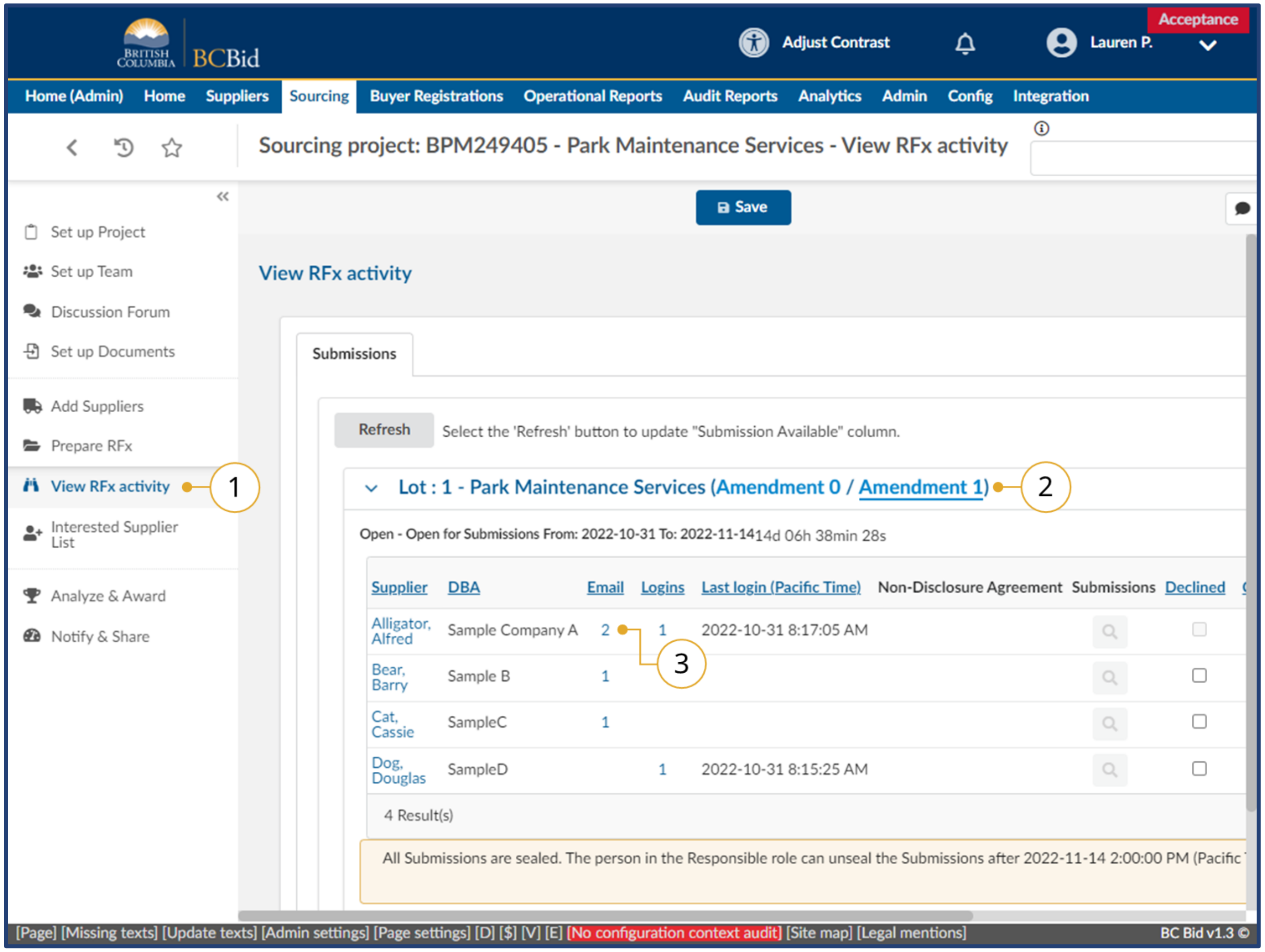


11. *Optional*: To change the status of a Program from Approved to Terminated, select **Terminated** from the Status drop-down.

    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

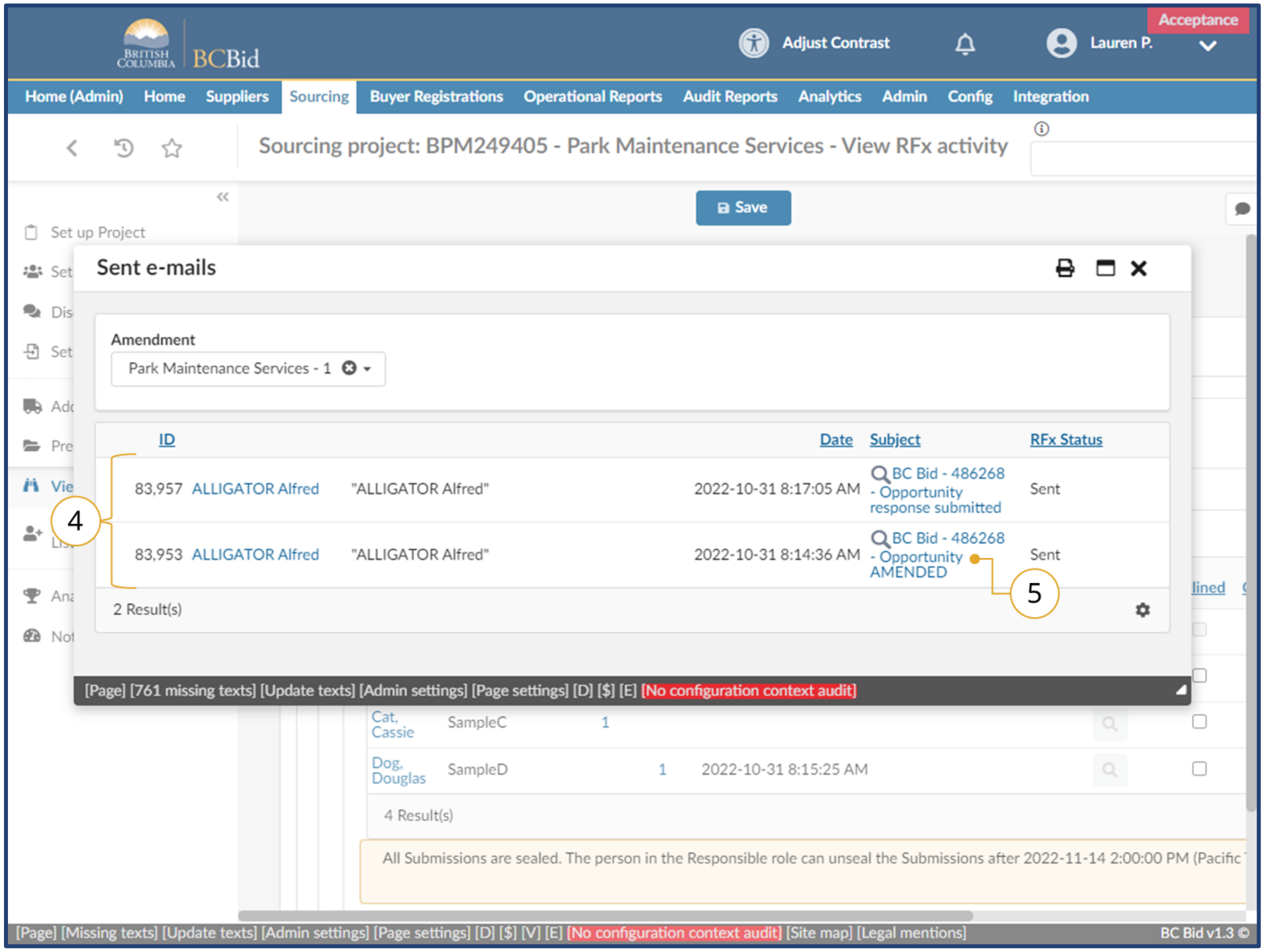
Buyers can view the emails sent from BC Bid to a supplier. Suppliers may receive a different number of notifications from one another depending on when they click Start Submissions or other notifications they receive such as e-Bidding confirmation.



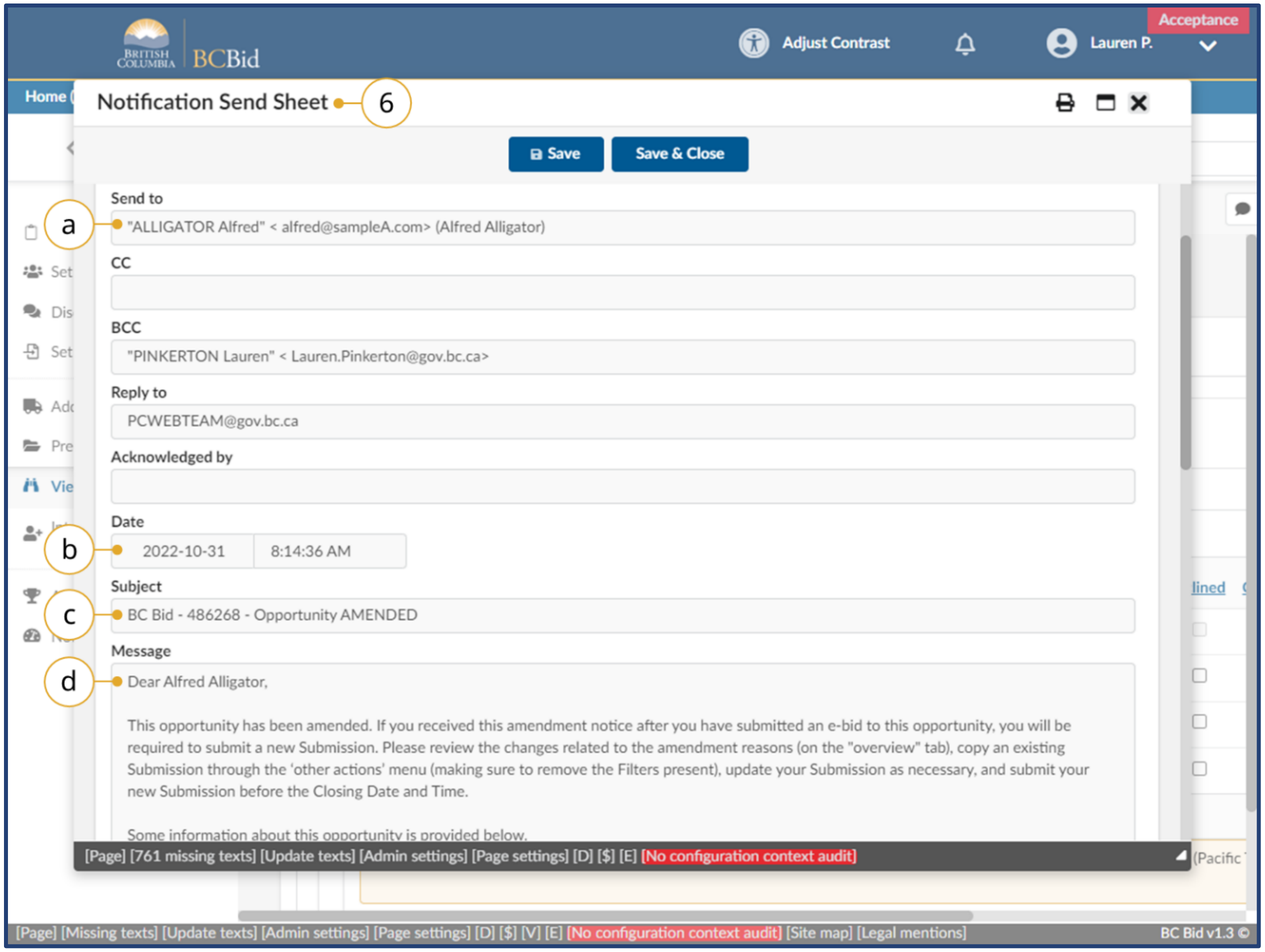
1. Click on **View RFx Activity**.
2. Choose amendment version to view.
3. Click on the **number** in the Email column.

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.



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_HlPD8w
Approvals Workflow and Issuing an Opportunity	https://youtu.be/65sLwv_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..
One the **Cancelled** button has been selected and the action confirmed by selecting OK, the action cannot be undone.

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

Appendix 5: Sourcing Project Team Roles

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

Responsible

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

Official Contact

- Edit the sourcing project
- Send and receive Discussion Forum messages
- The only one who can receive Discussion Forum messages from suppliers
- Add/edit documents (Set up Documents or Prepare RFx Documents)
- Add suppliers to a Sourcing Project
- Create a supplier* (from Add Suppliers menu)
- Edit the opportunity
- Add/edit items tab (ITQ and Timber Auction only)
- Edit an amendment in draft status
- Enter supplier offline submissions
- View and download supplier submissions (once unsealed, if applicable)
- 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	✓	✓	✓	-	

* Suppliers can also be created by selecting **Suppliers** from the main menu, then selecting **Create**. Users don’t need to have a role on a team to create a supplier from the Suppliers menu.

BCBid