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To...	Follow these steps...	Tips and Links...
<b>Create Sourcing Project</b>	<ol style="list-style-type: none"> <li><b>Set up Project</b> based on the solicitation process: <ul style="list-style-type: none"> <li>Select <b>Invitation to Tender</b> in the <b>Sourcing Project Type</b>.</li> <li>If posting on behalf of another organization, <b>Issued for</b> is the Ministry/Branch requesting the procurement.</li> <li>Main Commodity/Other Commodities: Search for and select the Commodity.</li> <li>Select a <b>Program</b>, if needed</li> </ul> </li> <li>Click <b>Set up Team</b>: <ul style="list-style-type: none"> <li>By default, the person who creates the Project has the Official Contact and Responsible roles.</li> <li>Add any additional users based on their assigned roles.</li> </ul> </li> <li>Click <b>Set up Documents</b> to upload documents related to the opportunity. <ul style="list-style-type: none"> <li>The documents are in draft status and will need to be changed to Approved status before being added to the opportunity in Prepare RFx.</li> </ul> </li> <li><i>Optional</i>: Select <b>Add Suppliers</b> and search/select suppliers to be invited, if any.</li> </ol>	 <a href="#">How to create a Sourcing Project ITT</a>  <a href="#">Set up Team</a>  <a href="#">Set up Documents</a>  <a href="#">Add Suppliers Overview</a>
<b>Prepare RFx</b>	<ol style="list-style-type: none"> <li>In the <b>Setup</b> tab, fill in Summary Details and assign <b>Issue</b> and <b>Closing</b> dates.</li> <li>Click <b>Validate &amp; Save</b>. After saving, complete the additional fields.</li> <li>In the <b>Additional RFx Info</b> tab, complete the required fields.</li> <li>In the <b>Documents</b> tab, upload opportunity related documents (either new or from Set up Documents). Ensure all documents for supplier view are in approved status.</li> <li>In the <b>Suppliers</b> tab, review supplier(s) if invited to the opportunity. Return to Add Suppliers to add additional suppliers.</li> <li>In the <b>Requirements</b> tab create the required response form.</li> <li>In the <b>Items</b> tab add items or import.</li> </ol>	 <a href="#">Prepare RFx Setup-ITT</a>  <a href="#">Additional RFx Info</a>  <a href="#">How to add documents to an Opportunity</a>  <a href="#">Requirements - How to Copy from Template ITT</a>  <a href="#">Requirements - how to Create Manually ITT</a>  <a href="#">Requirements - How to Import from Excel ITT</a>  <a href="#">How to Create Items ITT</a>
<b>Issue RFx</b>	<ol style="list-style-type: none"> <li>Click <b>View as Supplier</b> for a final review of the RFx.</li> <li>Click <b>Ready to Issue</b>.</li> <li>Click <b>Issue Opportunity</b>.</li> <li>Edit the template email and remove all blue text from the Subject and Body.</li> <li>Click <b>Send and Close</b>.</li> <li>Click <b>OK</b> twice (Step 1 and Step 2). Your RFx is <b>Open</b>.</li> </ol>	 <a href="#">Issue an Opportunity ITT</a>
<b>Issue an Amendment</b>	<ol style="list-style-type: none"> <li>In any <b>Prepare RFx</b>, select the <b>Other Actions</b> drop-down list, then select <b>Create new Amendment</b>.</li> </ol>	 <a href="#">Issuing an Amendment</a>

	<ol style="list-style-type: none"> <li>Select the information to be copied to the new version, typically <b>Copy from Selected RFX</b>.</li> <li>In the <b>Prepare RFX Setup</b> screen, enter the <b>Amendment Reason</b> and select Issue and Closing dates.</li> <li>Make any required changes and <b>Issue</b> the opportunity.</li> </ol>	
<b>Unverified Bid Results</b>	<ol style="list-style-type: none"> <li>Click <b>Unverified Bid Results</b>.</li> <li>Click <b>Step 1 – Load Unverified Bid Results</b>.</li> <li>Click <b>Step 2 – Print Unverified Bid Results</b>.</li> <li>Click <b>Step 3 – Manually Enter Unverified Bid Result</b> <ul style="list-style-type: none"> <li>Complete the Unverified Bid information.</li> <li>Click the <b>Pencil</b> icon to edit any information</li> </ul> </li> <li>Click <b>Step 4 – Publish Unverified Bid Results to Public Portal</b> or if no bids were received click <b>Alternate Step 4 – Publish 0 Bids to Public Portal</b>.</li> </ol>	 <a href="#">Unverified Bid Results</a>
<b>Manual Revision Amount</b>	<ol style="list-style-type: none"> <li>Click <b>Unverified Bid Results</b>.</li> <li>Click the Pencil icon to edit an <b>Unverified Bid Result</b></li> <li>Enter the <b>Manual Revision Amount</b>.</li> </ol>	
<b>Review Submissions</b>	<p>Once the Opportunity closes:</p> <ol style="list-style-type: none"> <li>Add offline submissions, if any.</li> </ol> <p><b>All offline submissions must be entered before unsealing.</b></p> <ol style="list-style-type: none"> <li>Click <b>Unseal submissions</b> on the <b>Prepare RFX Setup</b> tab.</li> <li>Select <b>View RFX Activity</b> and review submissions for each supplier (download and distribute documents for evaluation).</li> </ol>	 <a href="#">Uploading Submissions ITT</a>   <a href="#">Unsealing and downloading Submissions</a>
<b>Award an Opportunity</b>	<ol style="list-style-type: none"> <li>Click the <b>Analyze &amp; Award</b> tab.</li> <li>For unselected Suppliers, click the <b>Do not Award</b> icon.</li> <li>Click the <b>Trophy</b> icon for the supplier who will be awarded the opportunity.</li> </ol>	 <a href="#">Awarding a Contract ITT</a>
<b>Notify &amp; Share</b>	<ol style="list-style-type: none"> <li>Send <b>Successful &amp; Unsuccessful notifications</b>; edit the email templates as required.</li> <li>Create <b>Contract Award Summary</b>.</li> </ol>	 <a href="#">Sending Award Results Notification to Suppliers</a>   <a href="#">Creating a Contract Award Summary</a>
<b>Update RFX and Project Status</b>	<p>Once a project is complete:</p> <ol style="list-style-type: none"> <li>In the <b>Prepare RFX Setup</b> tab, update the status as needed.</li> <li>In the <b>Set up Project</b> tab, update the status as needed.</li> </ol>	 <a href="#">Closeout an Opportunity</a>   <a href="#">Closeout a Sourcing Project</a>

## Provincial Help Desk

Help Desk hours: 8:30 am to 4:30 pm  
Monday to Friday  
Email Contact: [BCBID@gov.bc.ca](mailto:BCBID@gov.bc.ca)

Contact the help desk by phone:

Direct: 1-250-387-7301

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

## Training Help

Please see the BC Procurement Resources website for a list of Ministry trainers and contact information.



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