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iProcurement Sourcing via BC Bid

Table of Contents


1	About Sourcing via BC Bid	1
2	What you do in iProcurement	2
2.1	Create a Non-Catalog Request	2
2.2	Proceed to checkout	3
2.3	Enter Requisition Information	4
2.4	Enter Delivery Information	5
2.5	Enter Billing Information	7
2.6	Review Charge Accounts	9
2.7	Review Approver List / Enter Notes and Attachments	10
2.8	Submit for Approval	12
3	What happens in BC Bid.....	14
3.1	BC Bid Requisition Content	14
3.2	Processing/Sourcing of Requisition.....	14
3.3	Award PO arrives in CAS Oracle Financials	15
3.4	Standard PO is Approved.....	15
4	What you do in Purchasing after Award	16
4.1	Review PO Headers DFF	16
4.2	Attachments.....	16
4.3	One-Time Addresses.....	17
4.4	Add Tax	17
5	What happens in Receiving	20
6	Appendix A – Common reasons for Requisitions failing to transmit to BC Bid	21

1 About Sourcing via BC Bid

iProcurement has been integrated with BC Bid to allow the customer to send requisitions to the BC Bid application to obtain the assistance of a PSB (Purchasing Services Branch) Purchasing Agent in sourcing a procurement request (BCBID Central Sourcing), or to allow processing by a Ministry Buyer with access to BC Bid (BCBID Self Service).

The use of the BC Bid sourcing options is for new non-catalog requests only. Items listed in the iProcurement catalog have already been sourced (that is, the supplier, item details, and unit price have been negotiated and are known). Also, requisitions entered to add to existing Purchase Orders (PO) are not eligible for BC Bid sourcing as the award of the opportunity has already occurred, the supplier is known, and the requisition is intended only to extend or increase the PO amount.

The following describes the process steps that must be taken in order to successfully send a requisition to BC Bid for sourcing and receive the resulting Standard Purchase Order upon award of the opportunity.

 **Hint:** Any procurement activity requiring intervention by PSB will require following the process described below.

2 What you do in iProcurement

When sourcing via BC Bid, you must be able to indicate how the PO should be set up in Purchasing, how it should be received and billed, and how it should look for sourcing. Once you are confident that you have all of the details necessary to proceed with your requisition, enter a Non-Catalog Request.



Note: Prior to creating a requisition, it is essential that the preparer complete their Employee Profile (BCGOV Self Service Common Functions) including account coding, Primary Approver and Work Location. Default values from the profile are required for the approved requisition to import successfully into BC Bid.

2.1 Create a Non-Catalog Request

1. Enter a **Non-Catalog Request**.

On the [Non-Catalog Request](#) page, include the following information:

- **Item Type:** We recommend that you select either 'Goods billed by quantity', or 'Service billed by quantity' in order to be able to select a **Unit of Measure** (UOM) appropriate to your requested goods/services.
- The **Item Description**, appropriate **Category Code**, and the **Quantity** required.
- **Unit of Measure:** How the good or service is typically ordered and received (Hour, Box, Session or a single Unit).
- An estimated **Unit Price**/rate per unit.



Note: Procurement & Supply Services (PSS) will review your requisition; paying particular attention to your total PO amount and the UOM totals (the total number of goods you are ordering). PSS will endeavour to ensure the total value of your PO is not exceeded. The actual price of each item ordered may vary from the estimate provided by the ministry. PSS will enter this information into the BCBID system to generate a PO which quotes the final best price negotiated with the vendor. The PO sent to the ministry and the vendor will reflect the final best price, **not necessarily** the price that appears on the original requisition.

Unit Price: for non-catalog items this includes Freight & Miscellaneous charges, and can include Tax. **Do not include these as separate lines** in requisitions to be sourced via BC Bid.

Do not complete the following:

- **Any of the supplier information fields.** While this will not cause the requisition to be rejected, the information is not passed to BC Bid. To suggest one or more suppliers, use the **Notes To Buyer** field during checkout. See [Figure 1: Non-Catalog Request](#).

Non-Catalog Request
 * Indicates required field

* Item Type: Goods billed by quantity

* Item Description: Chairs for workstation

* Category: 71.7100

* Quantity: 6

* Unit of Measure: Each

* Unit Price: 450

* Currency: CAD

RFQ Required

Negotiated

Contract Number:

Enter the Contract Number (e.g. CSA / RSA number)

New Supplier

Supplier Name:

Site:

Contact Name:

Phone:

Supplier Item:

These fields are not used

Figure 1: Non-Catalog Request

2. Click **[Add to Cart]** and repeat as required, entering only non-catalog items.

2.2 Proceed to checkout

1. Once you have completed your shopping, click **[View Cart and Checkout]** on the **Shopping Cart** panel.
2. On the **Shopping Cart** page, review your requisition. In order to source via BC Bid, your requisition **must not** include catalog items.
3. Click **[Checkout]**.

2.3 Enter Requisition Information

The screenshot displays the 'Checkout: Requisition Information' page. At the top, there are tabs for 'Shop', 'Requisitions', and 'Receiving'. Below the tabs, there are sections for 'Requisition Information', 'Approvals', and 'Review And Submit'. The main form area contains several fields:

- * Requisition Description:** 'BCBid chairs for workstation'. A callout box says 'Include BCBID in Description'.
- PGO Procurement Process:** A dropdown menu.
- PGO Trade Agreement Code:** A dropdown menu.
- PGO PO Class:** A dropdown menu.
- PGO Start Date:** A date picker.
- PGO End Date:** A date picker.
- PGO Original Total Amount:** A text input field.
- Sourcing Method:** A dropdown menu with 'BCBID Central Sourcing' selected. A callout box says 'Select Sourcing Method'.
- PO Number:** A dropdown menu. A callout box says 'Leave PO Number blank'.

 Below the main form, there are two sections:

- Delivery:** Includes a checkbox for 'Urgent', a 'Need-By Date' field (10-Jun-2015 00:00:00), a 'Requester' dropdown (LAVOIE, NICOLE), a 'Deliver-To Location' dropdown (FIN-VIC-39647), and a 'Suggested Buyer' dropdown.
- Billing:** Includes a 'Charge Account' field (022.32183.34265.6070.32000000.000000.0000), a 'GL Date' field (10-Jun-2015), and a 'Tax Classification Code' dropdown.

 At the bottom of the form, there are two tips:

- TIP (Sourcing Method):** Select a sourcing method if this Requisition is to be sourced in BC Bid.
- TIP (PO Number):** Enter or select a PO if this Requisition is being Added To an existing PO.

Figure 2: Checkout: Requisition Information

- On the [Checkout: Requisition Information](#) page: pay particular attention to the following fields:
 - Requisition Description:** For ease of reference and inquiry, we recommend that you include "BCBID" in your requisition description.
 - PGO values:** Enter these values if known.
 - PGO Procurement Process, PGO Trade Agreement Code and PGO PO Class:** if you enter these values, they will be drawn from the requisition to the PO. If you do not enter these values, they will be assigned by the application and may require Buyer intervention on the final PO. For information on completing the PO Header DFF for the Purchase Order, refer to the [What you do in Purchasing](#) section in this document.
 - PGO Start Date and PGO End Date:** The values entered on the requisition will **not be** used on the Purchase Order. Instead, these values will be populated from the BC Bid Award Document to accurately reflect the award details.
 - PGO Original Total Amount:** The value entered on the requisition will **not be** used on the Purchase Order. Instead, it will be populated from BC Bid to accurately reflecting the total contract amount.
 - Sourcing Method:** Select either:
 - BCBID Central Sourcing (Purchasing Agent from PSB); or
 - BCBID Self Service (Ministry Buyer using BC Bid).

- **PO Number: Do not enter.** Doing so will cause the requisition to be rejected if you select a BC Bid sourcing method.

2.4 Enter Delivery Information

Enter:

- **Need By Date:** Defaults based on your iProcurement Profile. Adjust the date to accurately reflect when the goods/services are required.
- **Deliver-To Location:** Defaults from Requestor's iProcurement Profile but may be changed. If required, use [Enter one-time address](#) link to attach a specific delivery address which will forward to BC Bid.
- **Suggested Buyer:** Select a Buyer/PO contact person from within your Ministry. Do not select a PSB Purchasing Agent.

If you will be using *BCBID Self Service*, the buyer you select must have a valid IDIR User ID and have access to the BC Bid application.

If this is a multi-year requisition, or if delivery details are different for each line, then:

1. On the [Checkout: Requisition Information](#) page, click **[Edit Lines]**.

The **Requisition Information: Edit Lines** page displays.

2. Under the **Delivery** tab, adjust the **Need By Date** and **Deliver-To Location** for each requisition line to reflect where and when the goods/services are required.



Only the information from the first line is sent to BC Bid.

Suggested Buyer: Must be completed and must be the same buyer on all lines.

Requisition Information: Edit Lines
* Indicates required field Apply

Delivery | Billing | Accounts

Select Lines: Update Copy Delete

Select All | Select None

Select Line	Description	Urgent	Need-By Date	Requester	Deliver-To Location	Suggested Buyer
<input type="checkbox"/>	1 BCBid chairs for workstation	<input type="checkbox"/>	10-Jun-2015 0	LAVOIE, NICOLE	FIN-VIC-39647 Enter one-time address	NIEMANN, STEFAN

Figure 3: Requisition Information: Edit Lines



2.5 Enter Billing Information

Whether your requisition includes goods or services, recoverable tax is generally applicable. Complete the [Checkout: Requisition Information](#) page, as follows:

1. Do not include any tax amounts in the unit price of the goods/services requested.
2. Requisition preparers are required to enter a **Tax Classification Code** on the [Checkout: Requisition information](#) page.

Billing

Charge Account 022.32183.34265.6070.3200000.000000.0000

GL Date

Tax Classification Code

Figure 4: Checkout: Requisition Information - Billing

1. If taxes differ on multiple requisition lines, the **Tax Classification Code** can be entered for each line via **Edit Lines - Billing** tab. On the [Checkout: Requisition Information](#) page, click **[Edit Lines]**.

The [Requisition Information: Edit Lines](#) page displays.

2. Under the **Billing** tab, adjust the tax information for each line:

Requisition Information Approvals Review And Submit

Requisition Information: Edit Lines

* Indicates required field

Delivery **Billing** Accounts

Select Lines:

[Select All](#) | [Select None](#)

Select Line	Description	Category	Tax Classification Code
<input type="checkbox"/> 1	BCBid chairs for workstation	AJ.AJ01	PST AND PST


Figure 5: Requisition Information: Edit Lines – Billing Tab



2.6 Review Charge Accounts

The Charge Account information entered does not have any impact on BC Bid with one exception:

- Enter only one distribution line (Charge Account) per requisition line.

 **Note:** If any of your requisition lines have more than one distribution charge account, the requisition will be rejected when you Submit for Approval.

If charge account information is not the same for all lines, or if this is a multi-year requisition:

1. On the **Checkout: Requisition Information** page, click **[Edit Lines]**.

The [Requisition Information: Edit Lines](#) page displays.

2. Under the **Accounts** tab, review the information for each line:

- **Charge Account:** click the account link on each line to change coding
- **GL Date:** if required, change date to adjust the period to which encumbrance activity should be posted

Select Line	Description	Charge Account	GL Date
<input type="checkbox"/> 1	BCBid chairs for workstation	022.32183.34265.6070.3200000.000000.0000	10-Jun-2015

Figure 6: Requisition Information: Edit Lines – Accounts Tab

2.7 Review Approver List / Enter Notes and Attachments

There are several things you can do on the **Checkout: Approvals and Notes** page specific to the BC Bid process:

- Add the **Suggested Buyer** to the **Approver List**.
- Add **Notes** and **Attachments** for BC Bid.

Requisition Information Approvals Review And Submit

Checkout: Approvals and Notes
Your requisition will be sent to the following list of approvers.

Save Submit Back Step 2 of 3 Next

Approvals

TARRAS, LYNDA

Add Suggested Buyer to Approval List

Manage Approvals

Notes

Justification Note To Buyer

Enter notes to the Approver (Justification) and Buyer

Attachments

Add Attachment...

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

Figure 7: Checkout: Approvals and Notes

Adding the Suggested Buyer to the Approver List

When sourcing a requisition via BC Bid, we recommend that you add the **Suggested Buyer** to the end of your **Approver List**. The buyer then has an opportunity to review the requisition and add any standard or specific attachments required for sourcing, before the requisition is sent to the BC Bid application.

To do this:

1. On the [Checkout: Approvals and Notes](#) page, click **[Manage Approvals]**.
2. Choose the **Insert Approver** Action.

Figure 8: Checkout: Manage Approvals

3. Use the **Approver** flashlight to search for and select the buyer. Use the **Add to Location** drop-down to select *After the last approver*.

Figure 9: Checkout: Manage Approvals – Add Approver and Location Buttons

Adding Notes and Attachments


Complete the **Justification** (note to Approver) and/or **Note to Buyer** as required for your sourcing request.

- **Justification:** You may also want to include a note to the Approver indicating the sourcing method.

- **Note to Buyer:** This information is sent to BC Bid. Use this field to include information such as a suggested list of suppliers, to reference a pre-qualification list, or to provide delivery details for lines other than the first line.
- **Attachments:** add any attachments applicable to the sourcing of your requisition.
 - Any attachment that is 'Internal To Requisition' is uploaded to BC Bid. **All other attachment types are not used.**
 - When adding attachments you **MUST** complete the **Description** field or the requisition file will fail the validation process when sent to BC Bid.
 - You can include up to 100 'Internal To Requisition' attachments to be sent to BC Bid.
 - All file attachments are virus checked. If any problems are found, an email notice is sent to CAS Help to co-ordinate resolution with the Ministry.

2.8 Submit for Approval

When your requisition is complete, submit it for approval as you would any other requisition. The requisition undergoes the following approval process.

1. The requisition must pass a series of edits before it is sent to the first Approver. If the requisition passes, it is forwarded for approval.
 2. If the requisition fails any edits, it is rejected. The Preparer receives a notification identifying the condition(s) that were not met. The conditions under which a requisition could fail are:
 - Requisition contains Catalog Items
 - Requisition line has more than one distribution (Charge Account)
 - No Suggested Buyer
 - Suggested Buyer does not have access to BC Bid (Self Service was selected)
 - Requester, Preparer or Buyer do not have valid email address
 - Requisition references a PO
 3. EA(s) review and approve the requisition.
 4. Buyer reviews and approves (if added as last Approver)
 - If not satisfied, the Buyer (like any other Approver) can use **Edit Requisition** to review all details and adjust as required.
 - If the Buyer makes substantive changes to the requisition, it will automatically be re-submitted for approval of the revised document.
-  **Hint:** Once a requisition is approved, **do not use** the Change function to withdraw and amend it. It is **imperative** that a person wishing to amend the requisition (modifying or cancelling lines) contact the Buyer (Ministry Buyer or PSB Purchasing Agent). The Buyer can advise as to other steps that may be needed, depending on the sourcing status, and the Buyer can return the requisition to the Preparer.

Withdrawing using the Change function may cause system errors.



If you return and amend a requisition, it will require re-approval, and upon approval will be re-transmitted to BC Bid. The amendment will be accepted by BC Bid as long as the posting is not closed. The changes will be accepted by the Buyer and may be posted as amendments.

If you cancel a requisition line or an entire requisition, this action will not require re-approval. As a result, nothing is transmitted to BC Bid. Manual intervention is then required.

Coordination of all amendments is therefore crucial when sourcing via BC Bid, to ensure that potential suppliers are quickly notified of changes.

3 What happens in BC Bid

Once approved, requisitions are transferred to BC Bid in real time. The requisition's arrival triggers an email notice to the suggested buyer if self-service was selected or to a general "inbox" if Central Sourcing was selected.

3.1 BC Bid Requisition Content

Requisition information uploaded to BC Bid includes:

- Requisition Number, Description, Preparer Email Address, Preparer Contact Information and Start Date and End Date (if entered)
- Item Description, UOM, Quantity, Unit Price, Category, Requester Email Address, Requester Contact Information and Deliver-To Location from Line 1
- Net Amount (that is, if items were flagged as taxable, the tax is not transferred to BC Bid, nor is the corresponding tax dollar value)
- One-Time address, from first line where this was entered, is sent as an attachment and will display in the BC Bid Requisition Header Comments field
- Note to Buyer
- Internal To Requisition Attachments



Note: The ministry can send sensitive attachments that were not included on the requisition directly to the PSB Purchasing Agent, to be added to the requisition in BC Bid. By the same token, the Self-Service customer can load sensitive attachments directly to BC Bid.

Note: When submitting Attachments to BC Bid the Preparer must provide information in the Description field. If this field is not completed the requisition will not transmit to BC Bid. An email will be sent to CAS Help. An email will be sent to the Ministry preparer with instructions to change the requisition and resubmit for Approval.


Account Coding **is not transferred** to BC Bid. This will be automatically "attached" to the Standard PO from the requisition, after the opportunity is awarded and the PO is created.

3.2 Processing/Sourcing of Requisition

Ministry Buyer or PSB Purchasing Agent accesses BC Bid and initiates the following:

- The requisition is reviewed, including line details, attachments and notes/comments.
- Adjust the requisition: The Buyer/Purchasing Agent can change the commodity code, UOM, and other details as required for sourcing, if these are not appropriate for the goods/services being requested.
- A sourcing option is selected and the appropriate processing (for example, notifications or postings) is undertaken.

- Upon determination of the successful proponent, and conclusion of any required negotiations, the Award Document is created.
- If there is a one-to-one relationship between requisition lines and supplier sourcing solution, the Buyer or PSB Purchasing Agent "Sends" the Award Document back to CAS Oracle Financials Purchasing module to automatically create the Standard Purchase Order.

 **Note:** In the event a requisition line is awarded to multiple suppliers, the Ministry Buyer/Purchasing Agent (or a PO Clerk on their behalf) will use the AutoCreate function in Purchasing in order to create multiple POs by splitting the Requisition line as needed. Only under these circumstances, the Award PO is not sent back from BC Bid to Purchasing via the nightly interface.

All of the functionality and processing normally associated with the AutoCreate function is used, as it would be for an Internally-sourced requisition.

3.3 Award PO arrives in CAS Oracle Financials

CAS Oracle Financials receives Award Information:

- PO Data is received via CGI (QP Feeder) nightly.
- Edits are run (for example, confirm that the requisition is in "Approved" status, that requisition lines are available (have not been AutoCreated or Cancelled) or that the PO Number hasn't already been used). If all edits are passed, the PO is brought in to the Purchasing module.
- Requisition lines are linked to the PO; account coding is brought in; and the PGO field values are populated on the PO (from the requisition, if applicable, and from the Award Document as described in section: 2.3 Enter Requisition Information).

3.4 Standard PO is Approved

The PO Approval Workflow is triggered and PO Approval occurs as usual.

- If the PO amount is equal to or less than the requisition amount, the PO is Immediately Approved.
- If the PO amount exceeds the approved requisition amount, the PO is automatically routed for approval to the Preparer's EA. This occurs after the PO has been imported from BC Bid. If the Buyer needs to make any changes to the PO, this update can occur after the PO has been approved.


4 What you do in Purchasing after Award

Once the PO is approved, the following steps are taken.

4.1 Review PO Headers DFF

Confirm PGO Values in **PO Headers** DFF:

- **PGO Procurement Process:** If not entered on the requisition, this field will be set to *900* (This code will be inactivated - Do Not Use). The Buyer **must** update this value to reflect the process undertaken to arrive at this PO.
- **PGO Trade Agreement Code:** Review and adjust if required.
- **PGO PO Class:** If not entered on the requisition, the PO Class will be set to *C (Contract)*. Review and adjust as required.

 **Note:** Do not Unreserve the PO to make these changes. The PO will not require re-approval.

4.2 Attachments

Add Attachments To Supplier if applicable, as they are **not brought forward** from iProcurement, **nor** are Attachments **brought back** from BC Bid. This could include Terms and Conditions, Specifications or other documents, pertinent to the Supplier.

4.3 One-Time Addresses

If used on the requisition, add One-Time address on the PO. This information is saved as an attachment on the requisition and is **not brought forward** from the requisition so must be re-entered on the PO.

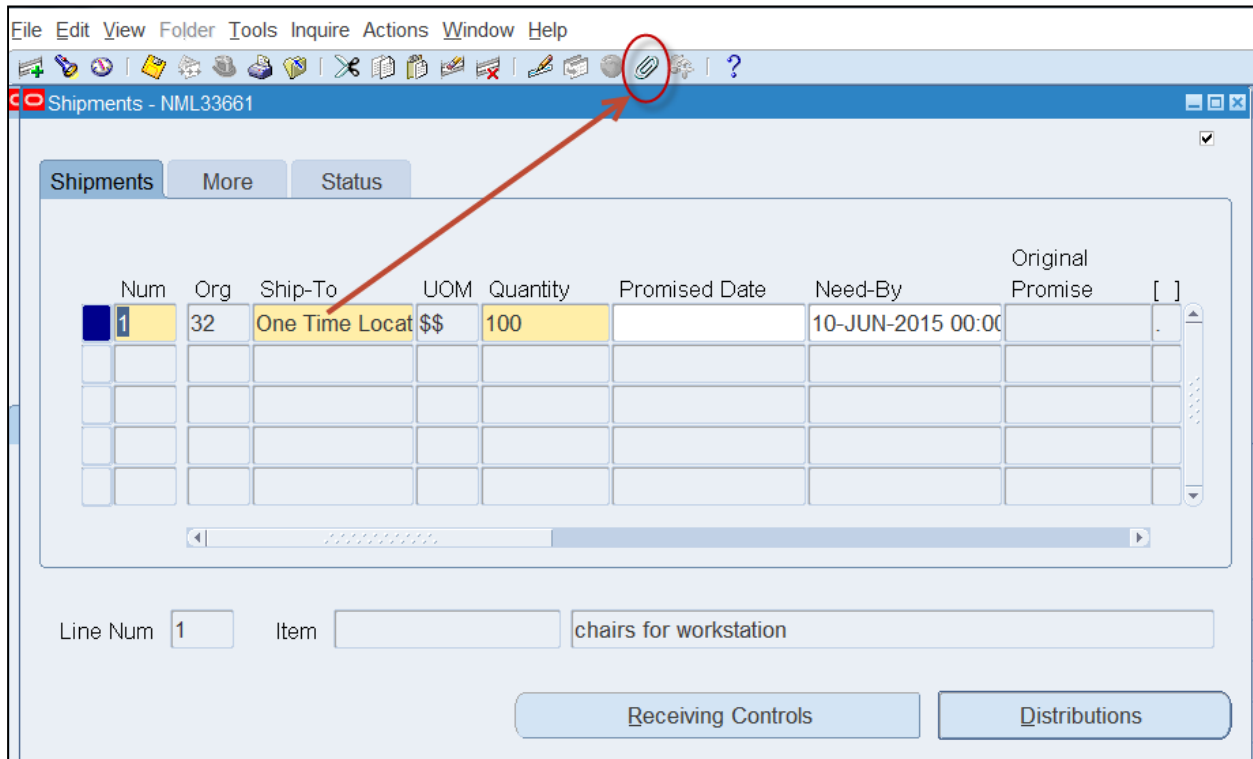


Figure 10: Purchasing: Purchase Order: Shipments - Shipments Tab

1. Place your cursor on the Shipment displaying 'One Time Location' in the **Ship-To** field.
2. Click the **Attachment** icon and enter the One-Time address as an attachment To Supplier.

4.4 Add Tax

This information is **not brought forward** from the requisition **nor is it brought in** from BC Bid. Tax must be manually entered on the PO.

Note: Adding recoverable tax (GST) to a PO does not require EA approval. Addition of nonrecoverable tax (PST) will require EA approval.

To add Tax to a line:

1. Display the PO on the **Purchase Orders** window.
2. **Unreserve** the Purchase Order.

- From the Menu bar **Actions** select **Manage Tax**.

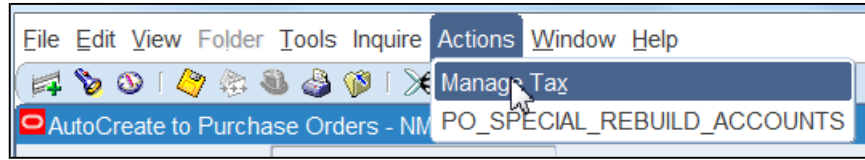


Figure 11: Tool bar - Manage Tax

- From the **Tax: Standard Purchase Order #** window click **[Additional Tax Information]**.

Tax: Standard Purchase Order NML33661

Operating Unit	Finance and Citizens Services	Additional Tax Information
Supplier	ABCD - THE ASSOCIATION FOR THE BENEFIT OF CHILDREN WITH DISABILITIES	
Supplier Site	001	
Buyer	LAVOIE, NICOLE	
Order Description	description	
Currency	CAD	
Amount	100.00	
Nonrecoverable Tax	0.00	
Recoverable Tax	0.00	
Total Tax	0.00	
Approval Amount	100.00	

Search

Line:
 Line Description:
 Schedule:
 Location:

Schedules **Distributions**

Details	Line	Line Description	Schedule	Location	Amount	Nonrecoverable Tax	Recoverable Tax	Total Tax
Show	1	chairs for workstation	1	One Time Location	100.00	0.00	0.00	0.00

Figure 12: Tax: Standard Purchase Order #

- From the **Additional Tax Information: Standard Purchase Order #** use the **Tax Classification** search light to select the appropriate tax for each line. When complete click **[Apply]** to save your changes.

Tax Determining Factors for Lines

Search

Line	Description	Schedule	Location	Transaction	Business Category	Product Type	Assessable Value	Tax Classification
1	chairs for workstation	1	One Time Location			SERVICES	100	GST and PST

Figure 13: Additional Tax Information: Tax Classification field

- Close the **Additional Tax Information: Standard Purchase Order #** and the **Tax: Standard Purchase Order #** windows and return to **Purchase Order** window.

- Click save



8. Re-approve the Purchase Order.

5 What happens in Receiving

The BC Bid integration has no impact on receiving. Receiving is completed in the same way as for any other requisition/PO.

6 Appendix A - Common reasons for Requisitions failing to transmit to BC Bid

Once the requisition has been approved by the EA and the Buyer (if added as last Approver) the requisition is transferred to BC Bid in real time. At BC Bid the file will go through a validation process to ensure the file is completed as expected. We have identified the two most common reasons why a file may fail to transmit to BC bid resulting in the requisition having to be changed and resubmitted for EA approval.

- Requisition Attachment Description is missing

BC Bid requisitions must have a Description for each attachment. The Description field should provide a brief description about the attachment, as it is the title of the attachment that the suppliers see when the requisition is created into an ITQ.

- Use of Invalid Characters in line description, notes to Approver or buyer

- The following characters are not to be used:

#	~	!	?	\$	%	+	=	{	}
[]		\	<	>	"	^	;	

- The following character can only to be used in the Supplier Name: *
- The following characters can only to be used in the EMAIL address: @ and _