City of Phoenix

Submitter's Handbook

Office of the City Engineer Design and Construction Procurement

Introduction

The City of Phoenix uses the SAP Supplier Relationship Management (SRM) for eProcurement. RFx (Solicitation) is part of the eProcurement system.

Consultants and Contractors (Submitters) are invited to participate in the response of an RFx via the City of Phoenix Supplier Portal. Submitters must register with the City of Phoenix with appropriate Product Categories to be invited via email for the applicable solicitations. Submitters are to register via https://www.phoenix.gov/finance/vendorsreg. Submitters will only be invited to participate per the Product Category(s) pertaining to the RFx and a Supplier List is used to invite Submitters registered under the associated Produ

Once received, Submitters are to respond to the invitation before the Submission Date/Time elapses. Responses from Submitters are to be entered in the Supplier Portal for the City of Phoenix Contracts Specialist to review in the SAP eProcurement Portal. Submitters are responsible for the completeness and accuracy of their RFx Response submission.

It is imperative that Submitters log-in to the City of Phoenix Supplier Portal regularly to view their Invitations for RFx Response, check the status of their RFx Response(s) and to take appropriate timely actions relating to the RFx.

Accessing the City of Phoenix Supplier Portal

Submitters will receive the Invitation for RFx Response via the City of Phoenix Supplier Portal. Submitters will log-in to the City of Phoenix Supplier Portal at URL https://eprocurement.phoenix.gov/irj/portal

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	User * Password * Log On Logon Problems? Get Support

Submitters may use any internet browser to log-in to the Supplier Portal, however, Internet Explorer 11 and Google Chrome are recommended.



After successfully logging in to the City of Phoenix Supplier Portal, the following screen appears.

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To access RFx information, click the RFx and Auctions tab on the ribbon. Submitters will see an Overview of all RFx(s) that they are invited to Respond to.

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RFx and Auctions Administration Messages	
Home Create Users Own Data Company Data	
Administration > Home	
Welcome Vendor Administrator	
Thank you for your interest in becoming a vendor in the City of Phoenix Portal.	
As a Vendor Administrator for your company you have the authority to:	
 Maintain Own Data Create Additional Users Maintain your Company and User data Maintain your Product Category selections Access Vendor Help Portal 	
It is your responsibility to keep all information current. If your e-mail address is not correct, your firm shall be deleted from our vendor file when we perform a maintenance check of the electronic notification for all applicable solicitations. Vendors must routinely check our City of Phoenix Bids site for a listing of current business opportunities. The Vendor Administrator Divis for any particular reason.	system. Being a registered vene sion will not be responsible if a vene sion will not be respo
If you have any questions, please visit our City of Phoenix Portal site at: https://www.phoenix.gov/financesite/Pages/EProc-help.aspx	
If you would like additional assistance, please send an email to vendor.support@phoenix.gov or call (602)262-1819.	
Thank you for registering!	



If logging in for the first time, the Overview will allow Submitters to see all active RFx Events (Numbers), Descriptions, Types, and Status as well as the Start and End Dates / Times.

Submitters should click the Refresh button to ensure that current / updated RFx data is loaded.

Submitters can also filter this list by clicking the Show Quick Criteria Maintenance] button. Submitters can choose to display a specific RFx by searching for it.

If you are returning to your RFx Event after logging off, you can easily access your RFx Response, by locating the Response Number associated with the RFx (Event) you want to edit. Click on your RFx Response Number (hyperlink), and a new window will pop-up which will allow you to make changes to your RFx Response directly. Remember, you can't make changes to any attachments within the system. You can only add or delete attachments. Document editing should be done on your PC.

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RFx Response numbers will not appear unless you've accessed the RFx Event and saved any actions within the system.

A Response Status of '**In Process'**, or '**Saved'** indicates you are still in edit mode, and need to complete a step(s) before the system will update your RFx response to Submitted. Your Response Status should display as '**Submitted**' prior to the Submittal Deadline.

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Displaying an RFx Event

To Display an RFx Event, Submitters should click the gray box next to the Item and then click the **Display Event** button to display of the Item and then click the **Display Event** button to display of the Item and then click the **Display Event** button to display of the Item and then click the **Display Event** button to display of the Item and then click the **Display Event** button to display of the Item and then click the **Display Event** button to display of the Item and then click the **Display Event** button to display of the Item and then click the **Display Event** button to display of the Item and button to display details of Solicitation.

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The RFx Event will open in a new window.

Review information on the RFx Information Tab.

- Start Date / Time: This is the Start Date / Time to submit an RFx Response. Submitters cannot Create a Response prior to this Date / Time.
- Submission Deadline Date / Time: Last Date / Time for submitting an RFx Response.
- Opening Date / Time: Date/Time on which RFx Responses are open for Contracts Specialist review.

						Options 🔻
Display RFx :						Open side panel
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RFX Information Items Notes and Attachments						
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Time Zone: MSTNO * Start Date: 07/11/2018 13:30:00 * Submission Deadline: 07/11/2018 14:00:00 Opening Date: 07/11/2018 14:00:00 Currency: USD * Title: SOILS AND MATERIALS TESTING ON-CALL SERVICES CALENDAR		irtment No.: 63				
▼ Partners and Delivery Information						
Details Add Center Cent						Filter Settings
Function	Number	Name		Phone Number		
Requester		Training Buyer12				

Submitters must choose to 'Participate' in order to receive RFx Event level emails associated with the RFQ, Noticiations, Attendance Sheets, etc. There are no RFx level emails that are generated, i.e. a confirmation email once you submit your SOQ via the ProcurePHX system.

Participate	Do Not Participate	Tentative

Some Submitters may see a 'Register' button instead of Participate, Do Not Participate, or Tentative. Once you click the 'Register' button, those three additonal options should appear, which will then allow you to click 'Participate'.

Display RFx :				
Print Preview 🗘 Close Participate Do Not Participate Tentative Create Response	e Questions and Answers (0) Export System Info	rmation Create Memory Snapshot		
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Details Add A Send E-Mail Call Clear				
Function	Number	Name		Phone Nun
Requester		Training Buyer12		

Creating an RFx Response

Once the Start Date /	⁷ Time has passed	, Submitters can click the	Create Response	button.
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The Submitter's RFx Response will open in a new window.

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Submitters should review each Note Category to ensure they are following RFx Response requirements. Submitters can open the Note Categories by clicking on the hyperlinked text next to each.

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	Change Conditions of Participation

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RFx Response Numb RFx Response	er 7000000157 RFx Num Version Number Active Version		In Process Submis	sion Deadline	07/11/2018 14:00	00 MSTNO Opening Date	07/11/2018 14:00:00 MSTN	O Remaining Time	0 Days 00:14:18	RFx Owner Training Buye	r12 Total Value	0.00 USD	
RFx Information			racking										
Dasic Data Questi		Conditions											
▼ Notes													
Clear													Filter Settings
Category				Description	ı								
Conditions of Pa	rticipation			See attach	ed Request for Qu	alifications.							
RFx/Auction Tex	t			The City of	Phoenix is seekin	up to 18 qualified consul							
Bidder's Remark				-Empty-									
Purchaser's Rer	arks			-Empty-									
					Change RFx/Au	ation Text							
➡ Attachments					Change Ri X/Au								
Add Attachment	Edit Description Versioning 🖌	Delete Create Profile			RFx/Auction Tex	The City of Phoenix is seekin testing on-call services on an	g up to 18 qualified consultar	nts to provide soils and ma	aterials				
Category	Description	File Name	Version Processor	Checked Out		with an option to extend the c	ontract for an additional one-	year period. These contra					
Standard Attach	ment Request for Qualifications	Request for Qualifications.pdf	f 1			be administered by the Street	t transportation Department.						
								OK	Cancel				
									//				

Submitters can open RFx Attachments by clicking on the hyperlinked text and choosing Open or Save.

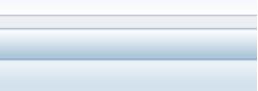
								Options 🔻
Crea	ate RFx Response							
	mit Read Only Print Preview Check Close Save Export Import Questio	ons and Answers (0) System Information Create Memory Snapsho	yt					2 4
RFx	Response Number 7000000157 RFx Number 6000000583 Status in Pr RFx Response Version Number Active Version RFx Version Number 2	rocess Submission Deadline 07/11/2018 14:00:00 MSTNO	Opening Date 07/11/2018 14:00:00 MSTNO	Remaining Time 0 Days 00:14:18	RFx Owner Training Buyer12	Total Value	0.00 USD	
	RFx Information Items Notes and Attachments Summary Tracki	ing						
Basi	c Data Questions Notes and Attachments Conditions							
-	Notes							
	Zlear							Filter Settings
	Category	Description						
	Conditions of Participation	See attached Request for Qualifications.						
	REx/Auction Text	The City of Phoenix is seeking up to 18 quali	fied consul					
	Bidder's Remarks	-Empty-						
	Purchaser's Remarks	-Empty-						
-	Attachments							
4	Add Attachment Edit Description Versioning / Delete Create Profile		Filter Settings					
	Category Description File Name V	ersion Processor Checked Out Type Size (KB) Changed by	Changed on					
	Standard Attachment Request for Qualifications Request for Qualifications.pdf 1	pdf 87 BUYER12	07/11/2018					
		Do you want to open or save Request for Qualifications.pdf (86.2 KB) from srm.qa.phoenix.gov ?	Open Save	▼ Cancel ×			

The RFx system will show a variety of messages in the Header Messsage area.

Red warnings require mandatory review and must be corrected in the Response prior to clicking the Submit button. Yellow and Green messages are for information and may need discretion to correct.

In this case, the messages are stating that Submitters must respond to each Line Item before the RFx Response can be Submitted. This screen shot is for illustration purposes only.

Create RFx Response	
Submit Read Only Print Preview Check Close Save Export Import Questions and Answers (0) System Information Create Memory Snapshot	
🏭 Line 0002: Attribute Did you provide a response? is mandatory; maintain attribute value	
🕕 Line 0003: Attribute Did you provide a response? is mandatory; maintain attribute value	
🕕 Line 0004: Attribute Did you provide a response? is mandatory; maintain attribute value	
🕕 Line 0005: Attribute Did you provide a response? is mandatory; maintain attribute value	
Time zone MSTAZ is not valid in country US (several possibilities) - Display Help	
RFx Response Number 7000000157 RFx Number 6000000583 Status In Process Submission Deadline 07/11/2018 14:00:00 MSTNO O RFx Response Version Number Active Version RFx Version Number 2	Opening
RFx Information Items Notes and Attachments Summary Tracking	
▼ Item Overview	



g Date 07/11/2018 14:00:00 MSTNO

Notes and Attachments

On the Header

tab, Submitters are able to upload their RFQ Response document(s).

To upload an Attachment, Submitters should click the Add Attachment button.

reate RFx Response	2									
ubmit Read Only Print P	eview Check Close Save Expor	t Import Questions and A	Answers (0) System Inf	ormation Create Memory Snapsh	ot					
Time zone MSTAZ is not valid	in country US (several possibilities) - Disp	blay Help								
Fx Response Number 7000 RFx Response Version		Status In Process on Number 2	Submission Deadlin	07/11/2018 14:00:00 MSTNO	Opening Date 07/11/2018 14:00	00 MSTNO Remaining Time	0 Days 00:11:23	RFx Owner Training Buyer12		
RFx Information Iter	Notes and Attachments	Summary Tracking								
▼ Notes										
Add a Clear										
Assigned To Category				Text Preview						
Document Conditions	of Participation			See attached Request for Qualifications.						
Document RFx/Auction	n Text			The City of Phoenix is seeking up	to 18 qualified consul					
 Attachments 										
Add Attachment Add URL	Edit Description Versioning a Delete	Create Qualification Profi	le							
Assigned To	Category	Description	File Name	Version	Processor	Checked Out	Туре	Size (KB)		

			Options
			۷ 😮
Total Value	0.00 USD		
			Filter Settings
			Filter Settings
Changed by		Changed on	

Submitters should click the Browse...

button and navigate to their desired attachment document.

Add Attachment	×	-
Here you can upload an attachment. You have to assign it to either the document general data or to an item File: Browse Description: * Assign To: General Data =		
OK Cancel	//	

Submitters should add a Description and then click OK.

Add Attachment	Ту
Here you can upload an attachment. You have to assign it to either the document general data or to an item File: H:\SAP\RFx\My Compan Browse Description: pany's Response to RFQ * Assign To: General Data	
OK Cancel	

tab provides Submitters with a high-level overview of their RFx Response.



Summary

The

Before clicking the Submit button, Submitters should click the Check button to ensure that all system errors are gone.

	Options
Create RFx Response	
Submit Read Only Print Preview Check Close Save Export Import Questions and Answers (0) System Information Create Memory Snapshot	Ø 4
RFx Response Number 7000000157 RFx Number 6000000583 Status In Process Submission Deadline 07/11/2018 14:00:00 MSTNO Opening Date 07/11/2018 14:00:00 MSTNO Remaining Time 0 Days 00:10:49 RFx Owner Training Buyer12 Total Value 0.00 USD RFx Response Version Number Active Version RFx Version Number 2	
RFx Information Items Notes and Attachments Summary Tracking	
RFx Response Number: 7000000157 Items with Response: 5 out of 5 items responded to Questions: 5 out of 5 questions answered (5 out of 5 mandatory) Notes: 2 notes added Attachments: 1 attachments added	

If all errors are gone, Submitters can Submit their RFx Response by clicking the **Submit** button.

	Options 🔻					
Create RFx Response						
Submit Read Only Print Preview Check Close Save Export Import Questions and Answers (0) System Information Create Memory Snapshot	(] 🖌					
RFx response is complete and contains no errors						
RFx Response Number 7000000157 RFx Number 6000000583 Status In Process Submission Deadline 07/11/2018 14:00:00 MSTNO Opening Date 07/11/2018 14:00:00 MSTNO Remaining Time 0 Days 00:10:49 RFx Owner Training Buyer12 Total Value 0.00 USD RFx Response Version Number Active Version RFx Version Number 2						
RFx Information Items Notes and Attachments Summary Tracking						
RFx Response Number: 7000000157 Items with Response: 5 out of 5 items responded to Questions: 5 out of 5 questions answered (5 out of 5 mandatory) Notes: 2 notes added Attachments: 1 attachments added						

Submitters will see a confirmation message that your response was submitted. No email notification will be sent. Confirm you have the required number of attachments listed, as outlined in the RFQ.

	Options
Display RFx Response:	
🖉 Edit Print Preview 🍫 Close Withdraw Export Questions and Answers (0) System Information Create Memory Snapshot	2 🖌
RFx response 7000000157 submitted	
RFx Response Number 7000000157 RFx Number 6000000583 Status In Process Submission Deadline 07/11/2018 14:00:00 MSTNO Opening Date 07/11/2018 14:00:00 MSTNO Remaining Time 0 Days 00:10:49 RFx Owner Training Buyer12 Total Value 0.00 USD RFx Response Version Number Active Version RFx Version Number 2	
RFx Information Items Notes and Attachments Summary Tracking	
RFx Response Number: 7000000157 Items with Response: 5 out of 5 items responded to Questions: 5 out of 5 questions answered (5 out of 5 mandatory) Notes: 2 notes added Attachments: 1 attachments added	

Submitters can refresh the RFx Event by clicking the **I** button.

	Options 🔻
Display RFx :	Open side panel
Print Preview Close Do Not Participate Tentative Create Response Questions and Answers (0) Export System Information Create Memory Snapshot	2
RFx Number 6000000583 Smart Number PHX-19-R-ZCIP-63-000004-001 RFX Status Published RFx Start Date 07/11/2018 13:30:00 MSTNO Submission Deadline 07/11/2018 14:00:00 MSTNO Remaining Time 0 Days 00:14:32 RFx Owner Training Buyer12 RFx Version Number 2 RFx Version Type Active Version	

Once refreshed, the Submitter will see the RFx Response number listed. Submitters can then click the Close button. Return to the RFx Overview (Event) Page.

Display RFx :
Print Preview Close Do Not Participate Tentative Questions and Answers (0) Export System Information Create Memory Snapshot
RFx Number 6000000583 Smart Number PHX 19 R ZCID 63 000001 001 RFX Status Published RFx Start Date 07/11/2018 13:30:00 MSTNO Submission Deadline 07/11/2018 14:00:00 MSTNO Remaining Time 0 Days 00:10:09 RFx Owner Training Buyer12 RF RFx Version Type Active Version RFx Response 7000000157
RFX Information Items Notes and Attachments
RFx Parameters Questions Notes and Attachments Table Extensions



The RFx Overview (Event) Page will update with the Submitter's RFx Response number, and Submitter's Response Status. After Submitting an RFx Response, you should return to this page to confirm your Response Status has changed to SUBMITTED. A Response Status of IN PROCESS or SAVED will not count your Submittal as received in the system. Make sure to always click the Refresh Button, and view your Response Status.

	Log off
When Submitters are finished, Submitters should click the	

button.

	orites Personalize View Help								
Administrati	ion Messages								
iew									
x and Auctions > Overview >	> RFx and Auctions								
A stine Onesies									
Active Queries									
	<u>ned (1) Ended (0) Completed (0)</u>								
eAuctions All (0) Publish	ed (0) Ended (0) Completed (0)								
eRFxs - All									
Show Quick Criteria Mair	ntenance								
View: [Standard View]	Create Response Display Event Display E	Display Response Print Preview	Refresh Export a						
Event Number	Event Description	Event Type	Event Status	Start Date	End Date	Response Number	Response Status	Event Version	Re
<u>6000000583</u>	PHX-19-R-ZCIP-63-000004-001	RFx for CIP	Published	07/11/2018	07/11/2018	<u>7000000157</u>	Submitted	2	
600000578	PHX-19-R-ZCIP-84-000001	RFx for CIP	Published	07/10/2018	07/11/2018		No Bid Created	1	
600000553	PHX-18-R-ZCIP-63-000026	RFx for CIP	Published	06/28/2018	07/20/2018		No Bid Created	1	
600000294	PHX-17-R-ZIFB-35-000007	Invitation for Bids	Published		12/06/2016	700000023	Submitted	1	
600000291	PHX-17-R-ZIFB-35-000005-001	Invitation for Bids	Published		12/02/2016	700000022	Submitted	2	
600000239	PHX-17-R-ZIFB-35-000003-001	Invitation for Bids	Published		12/07/2016	700000024	Saved	2	
	PHX-17-R-ZIFB-35-000002	Invitation for Bids	Published		10/19/2016	<u>700000011</u>	Submitted	1	
600000230									
600000230									
600000230									

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			Welcome: City o	f Phoenix
				[
			Full Screen	Options 🔻
	Chanc	ge Query Define Nev	w Query Persor	nalize 25
/ersion	Q&A	Start Time	End time	
	0	13:30:00	14:00:00	
	0	11:10:00	15:00:00	
	0	12:00:00	12:00:00	
	0	00:00:00	17:30:00	
	0	00:00:00	15:45:00	
	2	00:00:00	23:59:00	
	0	00:00:00	10:00:00	
				-
L	ast Refresh	07/11/2018 13:28:14	MSTNO <u>Refres</u>	h₽

Additional Notes

Submitters can click the Save button to Save a "Work in Progress" RFx Response.

Submitters can click the *Edit* button to enter Edit mode on their RFx Response.

Submitters can click the Delete button to Delete a "Work in Progress" RFx Response.

Submitters can re-Submit their RFx Response up until the Submission Deadline Date / Time.

Submitters can also Withdraw their RFx Response by clicking the Withdraw button.

QUICK TIP:

To Edit your RFx Response you must not be in 'DISPLAY' mode. Your window should either say "edit RFx Response' or 'Create RFx Response' in the top left corner of your screen.

Display RFx: Print Preview () Cit	ose Participate Do Not Par	ticipate Tentative	Create Response	Questions and Answers (
Create RFx Res	ponse			
Submit Read Only	Print Preview Check	Close Save E	xport Import	Questions and Answers