Step-by-Step Instructions for Creating a State Printing RFI or ITB

State Printing sourcing projects in Ohio|Buys will always use the Single Envelope project type. Single Envelope solicitations are those in which Bidders and/or Suppliers are instructed to submit all aspects of a response in a single envelope.

1. Log in to Ohio|Buys. From the Main Menu Navigation bar, click Sourcing and then select Create Sourcing Project from the drop-down menu.
   ▲ If you are creating an ITB based on a purchase requisition, you will need to open the purchase requisition and click Create Solicitation to begin the process outlined below.

The Create Sourcing Project page is displayed. On this page, you will need to complete the Sourcing General Information section. Note that any fields with a red asterisk are mandatory and must be completed to continue.

2. a) Update the Label field with the name for the sourcing project. This field is visible to Suppliers and must contain a brief, straightforward description of the purpose of the solicitation. If creating the solicitation from a purchase requisition, this field will default to the purchase requisition label and should be updated so that the needs of the solicitation are easily understandable for potential Bidders and/or Suppliers.

   b) Set the Project Type field to Single Envelope.

   c) Select DAS-Administrative Services as the Contracting Entity.

   d) Indicate the Commodities included in the solicitation. (e.g., 55100000 Printed Media)
   Additional commodities can be indicated using the Other Commodities field.

3. Click Save.
Navigate to the **Setup Documents** tab.

In the **Sourcing Documents** section, upload documents specific to this solicitation. To upload a document, click **Create document for this project**.

Select a document type from the list provided. Note that document types with **Public** in the name will be made publicly available upon completion of the sourcing project.
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Update the document information by including:

- **Title**: The name of the document.
- **Summary**: A description of the document contents.
- **Status**: Whether the document has been approved, drafted, blocked, or requires approval.

Click **Click or Drag to add files** to upload a document.

Select a document from your PC and click **Open** to upload it.

Click **Save & Close** to upload the document.

Navigate to the **Add Suppliers** tab.
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12. Click the **Selector ( ▼ ) icon** on the **Select Suppliers** field. Click **See All**.

13. Remove the **Commodity** filter by clicking the **X** icon.

14. Search for **DAS01** using Keywords search. When you have located them, click the **Checkbox ( □ ) icon** to their left.

15. Click **Save**.

If the MBE Set Aside slider is clicked, the solicitation will be flagged as MBE set aside on the Public Solicitations page. Users will only be able to invite MBE Suppliers to respond to the solicitation. Additionally, only registered MBE Suppliers will be able to respond to the Solicitation.

Engaging the MBE Set Aside slider will also update the Market Type field on the Setup Project tab.
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Navigate to the **Prepare Solicitation** tab.

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On the **Prepare Solicitation** tab:

a) Select the **RFx Type** from the drop-down menu. RFx types include:

1) **Request for Information (RFI)**: aimed at obtaining information about the capabilities and offerings of various Suppliers. Note that RFIs are not used to make awards to suppliers, if you intend to award a job to a supplier, use the ITB RFx type

2) **Invitation to Bid (ITB)**: aimed at obtaining responses from invited Suppliers

3) **Cancellation**: Used in a later round to cancel an existing RFx

b) If needed, update the **Solicitation Name**. At a bare minimum, this field should include a description of the solicitation that will be understandable to Bidders and/or Suppliers unfamiliar with the State. Please avoid using acronyms.

c) Indicate whether or not the solicitation is an **Amendment**.

d) Indicate the **Open and Closure** dates. These are the dates the solicitation will be available for Suppliers to respond to.

e) Indicate the **Inquiry Period** – these are the dates during which Suppliers can ask questions about the details of the solicitation.
f) Indicate the **Enable for Public Posting** dates – these are the dates during which the solicitation will be available for viewing on the public portal. Public posting dates should match the Open and Closure Dates and will auto-populate to match the Open and Closure Dates when they are initially filled out.

▲ If subsequent changes are made to the Open and Closure Dates, the Public Posting Dates will need to be manually updated to match.

g) Complete the **Process** section to provide a general overview of the selection process that will be used to award the solicitation. It is important to complete this field with as much detail as possible to keep Suppliers effectively informed about the selection process (e.g., for a Public Notice solicitation, provide instructions on where responses should be submitted since they will be submitted outside of Ohio|Buys; for a bid/quote, explain that an award will be made to the lowest responsive and responsible Bidder and/or Supplier).

h) Complete the **Summary** section to introduce and provide a general overview of the purpose for the request. It is important to complete this field with a straightforward explanation of what goods/services the solicitation is for, to provide Bidders and/or Suppliers with a high-level understanding of what is being sought.

Click **Save**.
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19. Within the Prepare Solicitation tab, navigate to the Questionnaire header.


   To upload the spreadsheet select Click or Drag to add a file, navigate to the file on your computer, and press Open.

21. To add additional questions to the questionnaire individually, click the + icon.

   a) Select the Question Type from the drop-down menu.
   b) Write the details of the question in the Section/Question section.
   c) Indicate whether the question is Mandatory and whether it will be scored by clicking the associated checkboxes.
   d) Click Save.

   ▲ Click the Preview button after adding questions to your questionnaire to review it.

22. Within the Prepare Solicitation tab, navigate to the Evaluation Questionnaire header.

   Configure the weight of each section as necessary. When adjusting the weighting for a questionnaire, users should change the weighting value in relation to how much they want that question/section to be emphasized. Note that weighting will always sum to 100%.

   ▲ Note that the Evaluation Questionnaire is optional and can be left blank if not needed.
Step-by-Step Instructions for Submitting a Hosted Catalog

Users must assign the Sourcing Responsible as the evaluator in the Default Responder Rules section.

1) **Assign**: In this field, search for and select the Sourcing Responsible user from the drop-down menu.

2) **Add the Rule**: Click to add the rule and assign the Sourcing Responsible as the evaluator of all questions.

Click **Save**.

Within the Prepare Solicitation tab, navigate to the Items header.

Click **Import Grids from Excel** and select the Standard_Printing_Item_Grid.xlsx file.

To upload the spreadsheet select **Click or Drag to add a file**, navigate to the file on your computer, and press **Open**.

▲ If the solicitation was created from a purchase requisition, the requested items will automatically appear in the item grid.
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Complete the item grid fields. Note that (V) indicates that a field will be visible to potential Bidders and/or Suppliers.

Continue to add items to the grid as necessary by selecting Add an Item from the Actions drop-down menu. You can use the Preview button to see what the item grids would look like to a Supplier.

Columns within an item grid can also be added or removed. To access the list of columns displayed, right-click the column header.

To remove existing columns, click Delete the field for that column header.

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Click Save.
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Navigate to the **Documents** header within the Prepare Solicitation tab.

Indicate which documents should appear on the RFx.

▲ Any document that should be visible to respondents must be included in this section,
a) Click **Create a Document** to upload a document that does not exist in the Setup Documents tab. You will be asked to select a document type. The process for doing this is the same process covered in the Upload and Manage Solicitation Documents section of this guide. While most of the document types are the same as those covered in the Upload and Manage Solicitation Documents section, the following options are unique to the Prepare Solicitation Tab:

- **[Template] RFx Excel answer form** – The item grid in Excel format
  ▲ Adding the RFx Excel answer form is not required. Suppliers can also fill out the item grid directly in the system, which is the recommended approach for Printing ITBs.
- **Ad-hoc Solicitation Document** – A document specific to the relevant solicitation that does not fall under one of the other document types
- **RFx Commercial Documents** – Reference documents that can be referred to on all State projects (i.e. documents puled from the General Documents section of the Setup Documents tab, etc.)
- **RFx Technical Documents** – Technical documents related to the RFx

b) Click **Attach Existing Documents** to select any documents already contained in the Setup Documents tab by clicking the **Checkbox** ( □ ) icon to their left.

Click **Save & Close**.
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Click **Submit**.

Click **Send**.

Click **Send & Close**.

Click **OK** in both pop-ups that appear.

The solicitation has now been posted and is available for responses.

▲ For more information on activities related to managing the solicitation, as well as analyzing and awarding Supplier responses, please refer to the Creating Managing and Awarding Solicitations Learner Guide.

If you have questions or need additional assistance, please contact Ohio Shared Services Contact Center via email (ohiosharedservices@ohio.gov) or phone (877-644-6771).