# Chapter 2 Procedures

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## Function Overview

The solicitation process is used to create vendor bid lists, send solicitations to vendors and request bids from vendors. The solicitation process is designed to process all types of solicitation documents: telephone quotations, sophisticated services solicitations, and web posting.

This process begins with the buyer creating a new solicitation, attaching a requisition to the solicitation, adding characteristics to the solicitation, creating a bid list, and preparing the solicitation to be printed and/or posted.

When the solicitation is created, the solicitation does not have complete information to continue processing. The remainder of the information is made available when a requisition is attached to the solicitation. When that occurs, the solicitation assumes the character of the requisition. Any subsequent requisitions attached to the solicitation must have similar characteristics as the first requisition attached (e.g., same award/solicitation code, same purchase agency, same buyer code, same set-aside code, etc).

There are a number of optional data elements which may be set by the buyer. For example, bid bond required, performance bond required, geographic bid codes, set aside criteria, cooperative procurement indicator, additional classes/subclasses, posting to the web, etc.

Conferences may be set up for the solicitation. Up to three conferences may be established. Certifications may be required by the solicitation. Up to five certifications may be requested as a part of the solicitation. Price sheet styles may be created for the solicitation. Vertical and horizontal price sheets may be created and column headers changed for each.

The solicitation may be scheduled using the automatic scheduling capability of AGPS or a manual schedule may be created. In either case, at least the bid opening date and time must be entered prior to attempting to issue the final solicitation.

Vendors will be automatically retrieved from the Commodity database when a draft or final solicitation is printed. The vendors retrieved will be controlled by the set aside criteria entered by the buyer. Vendors recommended by the user and included on the requisition will be automatically included. Vendors may be manually added to the bid list. These vendors need not be registered as a supplier of the commodity or service.

By setting the proper status code, the buyer may print multiple draft solicitations and one final solicitation. Along with the drafts and final solicitations, the buyer will receive a printed bid list of all vendors on the bid list for that solicitation.

After the bids are opened (whether formally or informally), the user should determine if all bidders are a part of the bidders list. If a bidder is not on the bidders list, that bidder should be added to the bidders list so the bid can be recorded. Bids cannot be recorded if a vendor is not in the AGPS Vendor database and included as a bidder on the solicitation.

To add the vendor to the bid list, see paragraph 4 Create/Change Solicitation Bidder Lists above.

There is information that pertains to the entire solicitation such as discount terms, FOB point and delivery date. This is referred to as vendor-level information. There is information that pertains to the individual lines on the solicitation such as unit price, brand name and model number and vendor preference. This is referred to as line-level information.

The vendor-level information is entered and the master bid return code is entered. The master bid return code characterizes the condition of the bid as acceptable, errors existed, exceptions taken, etc. The master bid return code is also used to determine if the vendor responded, and to update the Commodity and Vendor databases to show the vendor's response.

The line-level information is entered for each line bid and the bid return code is set on the line as well. The same bid return codes are used but in this case it applies only to the solicitation line. This information will be used to tabulate and rank this bid against all other bids recorded for this solicitation line.

Bid return codes are used to describe the condition of the vendor's bid and how it should be treated. The macro level (Master Bid Return Code) applies to the entire bid. The micro level (Bid Return Code) applies to each line item being purchased and responded to by the vendor. The various types of bid return codes are listed below:

Vendor Returned Responsive Bid
Vendor Failed to Respond
Vendor Returned Responsive Bid (With Minor Exceptions)
Vendor Returned Non-Responsive Bid
Vendor Returned a No-Bid
State Rejected Vendor's Bid
Vendor Withdrew Bid
Disregard this Bid

A **Vendor Returned Responsive Bid** is one which does not vary from the specifications and terms set out in the solicitation document. This bid return code identifies the bid as being acceptable and as such will be considered in the award process. This bid return code can apply to the entire bid or to lines on the bid. The bid return code that applies is 01. Before an award can be made on the line, the bid return code must be set to 01.

01 - Responsive Bid Returned

A **Vendor Failed To Respond** bid return code is used to identify when no response is received from the vendor. All bid return codes are initialized with this bid return code. If the vendor fails to respond, then nothing has to be done to this record. The bid return code that applies in this area is (03):

03 - Bid Not Returned

A **Vendor Returned Responsive Bid (With Minor Exceptions)** is one which does not vary from the specifications and terms set out in the solicitation document but does have some minor irregularity. This bid return code identifies the bid as one that may be accepted by the State or not. Routinely the bid would be accepted even with the irregularity. This bid return code can apply to the entire bid or to lines on the bid. The range of bid return codes which apply in this area are (10-3Z):

10 - Failed to Acknowledge Amend
11 - Alternate Bid Received
12 - Sample Not Received
13 - Literature Not Received
14 - Exception to Bid
15 - Exception - Other
16 - Failed to Initial Price Alter
17 - 3Z - Reserved

A **Vendor Returned Non-Responsive Bid** is a bid that does not conform to the essential requirements of the solicitation document. In its current state, this bid will not be considered for award. The range of bid return codes which apply in this area are (40-5Z):

40 - Bid Not Signed
41 - Bid Received Late
42 - Bid Submitted in Pencil
43 - Bid Bond Not Received
44 - Did Not Attend Mandatory Pre-Bid Conference
45 - Did Not Attend Mandatory Site Visit
46 - Failed to Return Reqd Certificate
47 - Failed to Return
48 - 5Z - Reserved

**Vendor Returned a No-Bid**. This set of bid return codes identifies no-bids. The range of bid return codes which apply in this area are (60-6Z):

60 - "No Bid" - Keep on Bid List
61 - "No Bid" - Remove From Bid List
62 - "No Bid~ - Can't Perform
63 - 6Z - Reserved

**State Rejected Vendor's Bid**. This range of bid return codes is used to identify that the bid was rejected and the reason why it was rejected. This range of bid return codes can be used only as a Master Bid Return Code. If a bid on a line is determined to be unacceptable, that line should be determined to be Non-Responsive. Once a bid has been rejected, that vendor cannot receive an award for that solicitation. The range of bid return codes which apply in this area are (70-7Z):

70 - Minimum Purchase Amt Unacceptable
71 - Does Not Meet Specifications
72 - Unit of Measure Change Unacceptable
73 - Minimum Quantity Unacceptable
74 - No Sample

75 - Does Not Meet Terms & Conditions
76 – Reserved
77 - Price Subject to Change
78 - 7Z - Reserved

**Vendor Withdrew Bid**. This range of bid return codes is used to identify the bids that were withdrawn by the vendor. This range of bid return codes can be used only as a Master Bid Return Code. If a bid on a line is determined to be unacceptable, that line should be determined to be Non-Responsive. Once a bid has been withdrawn by the Vendor, that vendor cannot receive an award for that solicitation. The range of bid return codes which apply in this area are (80-8Z):

80 - Withdrawal for Mistake in Bid
81 - Withdrawal for Bankruptcy
82 - Withdrawal - Miscellaneous
83 - 8Z - Reserved

**Disregard This Bid**. This bid return code is used to code those bids which are not to be considered in any evaluation process. This bid return code would be used to code any vendor's bid which may have been entered in error. The vendor's bid cannot be deleted so this bid return code has the impact of a physical delete of the record. This bid return code may be used on the overall bid or on a line on the bid. The bid return code that applies in this area is (99):

99 - Disregard this Bid

To receive a bid tabulation (tabs) after recording of bids, the buyer must set the status code on the solicitation to 375. The tabulation will be printed to assist in the evaluation process. Bid tabs will point out any inconsistencies recognized by AGPS such as, bid quantity not equal to solicitation quantity, bid unit of measure not equal to solicitation unit of measure, vendor inactive, unit price times quantity not equal to extended amount, line bid return code not acceptable, etc. The solicitation lines may be grouped to produce alternative rankings. The bid tab will rank the vendors for each item and for the group. Bid tabs may be ranked using the traditional low to high ranking or low to high considering prompt payment discount or high to low such as with discounts or no ranking at all.

A bid tab, after recording of bids, may be requested as well as that a proposed award be made by AGPS. This is done by setting the solicitation status code to 370. The proposed award is made based on information in AGPS and will be made only if all information on the line for the apparent low bidder is acceptable. For example, if a variance exists, the award will not be made. The proposed award may be accepted by the buyer or it may be overridden. The purpose of the proposed award is to minimize the number of buyer keystrokes.

Once the buyer has evaluated the bids and determined which bidder is to be awarded by each line, the award flag on the bidder's bid record for the line must be set. If the award flag is set manually, it must be set to Y. If AGPS performs a preliminary award, it will be set to S (for system set). If a subsequent award document is cancelled, AGPS will set the award flag to U (for un-award). The S or U may be changed to Y or N by the buyer.

Following are the details of the procedures to create a solicitation, attach requisitions, add characteristics to the solicitation, add vendors and prepare the solicitation for printing and/or posting, issuing the solicitation, recording bids, processing bid tabulations and processing awards.

# 1 ADD/CHANGE SOLICITATION RECORDS

## 1.1 Add Solicitation Header Table

**Overview**

The AGPS user is provided the capability to add the solicitation header table record in AGPS in preparation of solicitation processing. This document will contain all required solicitation data for processing. This is accomplished by the use of the SDOC screen.

**Inputs**

- Required solicitation title
- Required purchase agency

**Outputs**

- Updated SDOC Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation requirement(s). |
| AGCY 4: AGCY | **Purchasing Agency** must be key to a valid and active record in the AGCY Table. |
| INST 4: BAAT | User must have access and maintenance for the purchasing agency to process a record in SDOC. |
| | 2. Add SDOC Table data into AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **CLEAR** in the Function Line and press RETURN/ENTER. Screen data entry fields should be blanked and **ADD** inserted in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type **NEXT**. |
| | d. Using the TAB key, move to Title Line 1 field and type desired solicitation title. If line 1 is not enough, TAB to line 2 and complete title.. |

Cross-Reference Steps

e. Using the TAB key, move to Purchasing Agency field and type desired purchasing agency.

3. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

The solicitation record will be created with the next sequential number assigned by AGPS. The document type will show "UNK" - Unknown, the solicitation code will show "U" - Unknown and the award code will show "U" - Unknown. When the first requisition is attached, these data elements will be changed to the values from the requisition.

## 1.2 Change Solicitation Header Table

**Overview**

The AGPS user is provided the capability to maintain the solicitation header table record in AGPS after add in preparation of solicitation processing. This is accomplished with use of the SDOC screen.

**Inputs**

- Required solicitation number
- Required changes to days bids firm
- Required changes to solicitation title
- Required changes to status code
- Required changes to number of RFP copies
- Required changes to purchase agency
- Required changes to LaPAC Post
- Required changes to delivery days aro or weeks aro
- Required changes to alternate delivery schedule
- Required changes to FOB point
- Required changes to coop procurement
- Required changes to set aside code
- Required changes to T-Number
- Required changes to whim approval indicator
- Required changes to evaluation type
- Required changes to type price sheet
- Required changes to specify brand indicator
- Required changes to type bid tabulation

**Outputs**

- Updated SDOC Table

## Completing The Procedure

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation changes. This will normally be performed after a requisition has been attached to a solicitation. |
| AGCY 4: AGCY | **Purchasing Agency** must be key to a valid and active record in the AGCY Table. |
| INST 4: BAAT | User must have access and maintenance for the purchasing agency to process a record in SDOC. |
| INST 4: BTAB | **Status Code** must be a valid entry in BTAB Table SB (Status Code Solicitation). |
| | **Set Aside Code** must be a valid entry in BTAB Table SA (Set Aside Type). |
| | **T-Number** must be a valid entry in BTAB Table TA (T-Number). |
| | **Evaluation Type** must be a valid entry in BTAB Table ET (Evaluation Type). |
| | **Type Price Sheet** must be a valid entry in BTAB Table PS (Price Sheet Type). |
| | **Type Bid Tabulation** must be a valid entry in BTAB Table TB (Bid Tabulation Type). |
| | 2. Change SDOC Table data in AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |
| | 3. Type **CHANGE** in the Function Line. |

Cross-Reference Steps

a. Using the TAB key, move to Days Bids Firm field and type desired number of days that a vendor must honor a submitted bid for this solicitation.

b. Using the TAB key, move to Title Line 1 field and type desired solicitation title. If line 1 is not enough, TAB to line 2 and complete title.

c. Using the TAB key, move to Status Code field and type desired status code.

| If ... | Then ... |
|---|---|
| Identifying solicitation for supervisor review | Type status code = 301 |
| Identifying solicitation for buyer review | Type status code = 302 |
| Re-bid of solicitation | Type status code = 305 |
| Initiate Approvals | Type status code = 325 |
| Preparing a bid list | Type status code = 335 |
| Printing a draft solicitation (O/L) | Type status code = 345 |
| Printing a draft solicitation (O/N) | Type status code = 350 |
| Issuing a solicitation (O/L) | Type status code = 355 |
| Issuing a solicitation (O/N) | Type status code = 360 |
| Recording bids | Type status code = 365 |
| Printing a bid tabulation with automatic award (setting of award flags in RVEN for proposed awardee) | Type status code = 370 |
| Print bid tabulation w/o award | Type status code = 375 |
| Processing partial award (O/L) | Type status code = 379 |
| Processing partial award (O/N) | Type status code = 380 |
| Processing final award (O/L) | Type status code = 384 |

Cross-Reference Steps

| If ... | Then ... |
|---|---|
| Processing final award (O/N) | Type status code = 385 |
| Canceling solicitation | Type status code = 396-399 |

d. Using the TAB key, move to # RFP Copies field and type desired number of RFP copies.

e. Using the TAB key, move to Purchasing Agency field and type desired purchasing agency.

f. Using the TAB key, move to LaPAC Post field and type desired post solicitation indicator. Allowable entries are **Y** or **N**. If Y, solicitation will automatically post to the LaPAC internet site when a final print is accomplished.

g. Using the TAB key, move to Delivery Days ARO field and type desired number of delivery days.

h. Using the TAB key, move to Delivery Weeks ARO field and type desired number of delivery weeks.

i. Using the TAB key, move to Alt Del Schedule field and type desired indicator. Allowable entries are **Y** or **N**.

j. Using the TAB key, move to FOB Point field and type desired FOB point.

k. Using the TAB key, move to Coop Procurement field and type desired indicator. Allowable entries are **Y** or **N**.

l. Using the TAB key, move to Set Aside Code field and type desired set aside code.

m. Using the TAB key, move to T-Number field and type desired T-Number.

n. Using the TAB key, move to Whim field and type **P** (purchasing).

o. Using the TAB key, move to Evaluation Type field and type desired evaluation type.

p. Using the TAB key, move to Type Price Sheet field and type desired type price sheet.

Cross-Reference Steps

q. Using the TAB key, move to Specify Brand field and type desired indicator. Allowable entries are **Y** or **N**.

r. Using the TAB key, move to Type Bid Tabulation field and type desired type bid tabulation.

NOTE: If the solicitation is requesting a percentage discount from a catalog, the bid tabulation type must be **P** in order to record the percentage.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

## 1.3 Delete Solicitation Header Table

**Overview**

The AGPS user is provided the capability to delete the solicitation header table record in AGPS after add if not required. Status must be 300. This is accomplished by the use of the SDOC screen.

**Inputs**

- Required solicitation number

**Outputs**

- Updated SDOC Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation to be deleted. |
| | 2. Delete SDOC Table data in AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |
| | 3. Type **DELETE** in the Function Line. |
| | 4. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |
| | . |

## 1.4 Inquire Solicitation Header Table

**Overview**

The AGPS user is provided the capability to inquire the solicitation header table record in AGPS after add. This is accomplished by the use of the SDOC screen.

**Inputs**

- Required solicitation number

**Outputs**

- Display of requested SDOC Table record

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation to be inquired. |
| | 2. Inquire SDOC Table data in AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | 3. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display requested SDOC Table header record. |

## 1.5 Add Solicitation Notes Table

**Overview**

The AGPS user has the capability to add solicitation note text records for a solicitation header in AGPS. This text record may be used for processing information/instructions relating to a specific solicitation that will not be printed on any document. This is accomplished by the use of the SNTE screen.

**Inputs**

- Required solicitation number
- Required text

**Outputs**

- Updated SNTE Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine the solicitation for which notes will be added and the text to be entered into solicitation notes. |
| | 2. Add SNTE record into AGPS. |
| RQSN 4: SNTE | a. If you are not in the SNTE screen, type **SNTE** in the Function Line and press RETURN/ENTER. |
| | b. Type **G (GET)** in the Function Line. |
| | c. Using TAB key, move to Solicitation Number field and type desired solicitation number. |
| | 3. Press RETURN/ENTER. The text screen should be formatted with null (.) lines. If text is present, the text should be formatted to the screen. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display requested text record. |
| | a. Type **C (CHANGE)** in the Function Line. |
| | b. Using TAB key, move to the first text or null (.) line. Type the desired text. Text lines are seventy characters in length. A null (.) line cannot exist between text lines, (.) must be spaced out. |

| Cross-Reference | Steps |
|---|---|
| | 4. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'ALL LINES CHANGED' |

## 1.6 Change Solicitation Notes Table

**Overview**

The AGPS user is provided the capability to maintain solicitation notes text for a valid solicitation header record. This is accomplished by the use of the SNTE screen.

**Inputs**

- Required solicitation number
- Required change to text

**Outputs**

- Updated SNTE Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine the solicitation number for which the user will change notes text and the required change to text. |
| | 2. Change SNTE record in AGPS. |
| RQSN 4: SNTE | a. If you are not in the SNTE screen, type **SNTE** in the Function Line and press RETURN/ENTER. |
| | b. Type **G (GET)** in the Function Line. |
| | c. Using TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using TAB key, move to Text Action field and type desired text action. See Section 15, Miscellaneous Processing, General Text Processing, Chapter 2 for additional information. |
| | 3. Press RETURN/ENTER. The text screen should be formatted with null (.) lines. If text is present, the text should be formatted to the screen. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display requested text record. |
| | a. Type **C (CHANGE)** in the Function Line. |

| Cross-Reference | Steps |
|---|---|
| | b. Using TAB key, move to the desired text or null (.) line. Type the desired text. Text lines are seventy characters in length. A null (.) line cannot exist between text lines, (.) must be spaced out. |
| | 4. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'ALL LINES CHANGED'. |

# 1.7 Delete/Insert Solicitation Notes Table

**Overview**

The AGPS user is provided the capability to delete or insert lines of text for a valid solicitation notes record. This is accomplished by the use of the SNTE screen.

**Inputs**

- Required solicitation number
- Required change to text

**Outputs**

- Update SNTE Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine the solicitation number for which the user will delete/insert notes text and the required change to text. |
| | 2. Delete/Insert text lines in SNTE records. |
| RQSN 4: SNTE | a. If you are not in the SNTE screen, type **SNTE** in the Function Line and press RETURN/ENTER. |
| | b. Type **G (GET)** in the Function Line. |
| | c. Using TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using TAB key, move to Text Action field and type desired text action. See Section 15, Miscellaneous Processing, General Text Processing, Chapter 2 for additional information. |
| | 3. Press RETURN/ENTER. The text screen should be formatted with requested lines of text. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display requested test record. |
| | a. Type **C (CHANGE)** in the Function Line. |
| | b. Using the TAB key, move to the Text Action field and type **X (to delete)**, OR **I (to insert)**. |

Cross-Reference Steps

c. Using the TAB key, move to the Line Number field and enter the text line(s) to be deleted (as a single line, i.e., 1, 2, etc., or a line range 1-4, or ALL (all lines)) **or**, if inserting text, insert the text line number after which text is to be inserted.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'PREVIOUS UPDATE SUCCESSFUL'.

**X** will result in the deletion of the text line numbers specified in the Line Number field. If the action was **X**, the text screen will return with all lines that were not deleted. If the action was "X ALL", skip to step 4.c. Before using the "X ALL" function, please be sure you do not need the text.

**I** indicates that the user desires to insert line(s) of text after the line of text identified in the Line Number field. If the action was **I**, the text screen will return with the line identified in the line number field followed by blank (null (.)) lines ready for text to be entered. Remember, the line number is the position of the line on the screen, and will be one or more of the numbers 1 through 9.

a. If inserting text, type **C (CHANGE)** in the function line.

b. Using the TAB key, move to the first null (.) line and type desired text. A null (.) line cannot exist between text lines, (.) must be spaced out. Skip to step 5.

c. If overwriting existing text, with "CHANGE" still in the Function Line, tab to the Line Number field and enter "UPLD". The UPLD process is required for text screens that pull a text description from a text data base (i.e. commodity data base CSPC or text data base TXLN). When using screens that access these text data bases (i.e. RMOD - OMOD - OCMD - KMOD - STXL) and the user needs to delete ALL text lines and completely overwrite the existing description from a text data base, the UPLD (upload) process must be followed. Using the TAB key, move to the first null (.) line and type desired text.

5. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'PREVIOUS UPDATE SUCCESSFUL'.

# 1.8 Inquire Solicitation Notes Table

**Overview**

The AGPS user is provided the capability to inquire text for a solicitation notes record. This is accomplished by the use of the SNTE screen.

**Inputs**

- Required solicitation number
- Required text action

**Outputs**

- Display of requested SNTE Table text

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine the solicitation number for which the user will inquire text. |
| | 2. Inquire SNTE record text. |
| RQSN 4: SNTE | a. If you are not in the SNTE screen, type **SNTE** in the Function Line and press RETURN/ENTER. |
| | b. Type **G (GET)** in the Function Line. |
| | c. Using TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using TAB key, move to Text Action field and type desired text action. See Section 15, Miscellaneous Processing, General Text Processing, Chapter 2 for additional information. |
| | 3. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, the text line record should be displayed. |

# 1.9 On-Line Solicitation Build

**Overview**

On-Line Solicitation Build is a process that provides the user the capability to automatically build required solicitation documents directly from the requisition. This is accomplished with a status code change to 265 on RQS2.

**Inputs**

- Required requisition document complete with requisition line(s), accounting distribution (if required) and recommended vendor(s) on RQS5.

**Outputs**

- Update RQSN, SDOC, SRQN, SLIN and SVEN Tables

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine the requisition for which the user wants an on-line build of a solicitation. |
| | 2. Perform On-Line Solicitation Build in AGPS. |
| RQSN 4: RQS2 | a. If you are not in the RQS2 screen, type **RQS2** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using TAB key, move to Requisition Number field and type desired requisition number. |
| | d. Press RETURN/ENTER. Requested requisition number record should be formatted to the screen. |
| | 3. Type **CHANGE** in the Function Line. |
| | a. Using the TAB key, move to Status code field and type **265**. |
| | 4. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |

| Cross-Reference | Steps |
| --- | --- |
| | If the process was successful, the user should note a solicitation number displayed in the Solicitation field of RQS2. |

# 2 ATTACH/UN-ATTACH REQUISITION RECORD(S)

## 2.1 Add Solicitation Requisition Number

**Overview**

The AGPS user is provided the capability to attach requisition(s) to a solicitation for solicitation processing in AGPS. Requisition status must be 250. If more than one requisition is to be attached, all subsequent requisitions must have the same characteristics (e.g., solicitation/award code, buyer code, purchasing agency, set-aside code, etc.) as the original requisition record. This is accomplished by the use of the SRQN screen.

**Inputs**

- Required solicitation number
- Required sequence number
- Required requisition number

**Outputs**

- Updated SRQN/SDOC/RQSN Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine requisition(s) to be attached to a solicitation. The following conditions must be met for multiple requisitions.<br>• Requisition doc type must be the same.<br>• Requisition file number must be the same.<br>• Requisition solicitation code must be the same.<br>• Requisition award code must be the same.<br>• Requisition purchase agency must be the same.<br>• Requisition buyer code must be the same.<br>• Requisition set-aside code must be the same. |

| Cross-Reference | Steps |
|---|---|
| | NOTE: If multiple requisitions are being attached to one solicitation, a State Purchasing File Number should have been created on only one of the requisitions. When that requisition is attached to the solicitation first, the solicitation will carry that file number. Subsequent requisition attached will then carry the same file number. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active record in the SDOC Table. |
| RQSN 4: RQS4 | **Requisition Number** must be key to a valid and active record in the RQSN Table. |
| | 2. Add SRQN Table data (attach requisitions) into AGPS. |
| SDOC 4: SRQN | a. If the user is not in the SRQN screen, type **SRQN** in the Function Line and press RETURN/ENTER. |
| | b. Type **CLEAR** in the Function Line and press RETURN/ENTER. Screen data entry fields should be blanked and **ADD** inserted in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using the TAB key, move to Sequence Number field and type desired sequence number. |
| | e. Using the TAB key, move to Requisition field and type desired requisition number. |
| | 3. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.<br><br>If more than one requisition is to be attached to the same solicitation, repeat the above steps for each requisition. |
| | The solicitation header will be updated with the characteristics of the first requisition attached. This includes the file number and the set-aside code. The requisition header will be updated with the solicitation number to which it is attached and the subsequent requisitions attached will be updated with the file |

| Cross-Reference | Steps |
|---|---|
| | number of the first requisition attached. Additionally, the solicitation requisition table will be updated with the solicitation, sequence and requisition number for review as desired by the user. SDOC est amount will show total of all RQS5 records. |

## 2.2 Delete Solicitation Requisition Number

**Overview**

The AGPS user is provided the capability to un-attach requisition(s) from a solicitation in AGPS. If more than one requisition is to be attached, individual requisitions may be un-attached without affecting the other requisitions. This is accomplished by the use of the SRQN screen.

**Inputs**

- Required solicitation number
- Required sequence number
- Required requisition number

**Outputs**

- Updated SRQN/SDOC/RQSN Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine requisition(s) to be un-attached from a solicitation. |
| SDOC 4: SRQN | **Solicitation Number** must be key to a valid record in the SRQN Table. |
| | **Requisition Number** must be key to a valid record in the SRQN Table. |
| | 2. Delete SRQN Table data (un-attach requisitions) in AGPS. |
| SDOC 4: SRQN | a. If the user is not in the SRQN screen, type **SRQN** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using the TAB key, move to Sequence Number field and type desired sequence number. |
| | e. Using the TAB key, move to Requisition field and type desired requisition number. |
| | f. Press RETURN/ENTER. Requested solicitation requisition number record should be displayed. |

Cross-Reference Steps

3. Type **DELETE** in the Function Line. If a requisition is not to be un-attached, proceed to next step. Else, skip to step 4.

   a. Using the TAB key, move to Sequence Number field and space out the sequence number that is not to be deleted.

   b. Using the TAB key, move to Requisition field and space out the requisition number that is not to be deleted.

4. Press RETURN/ENTER.

   NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

   If the last attached requisition is un-attached, the solicitation header will be updated. The document type will show "UNK" - Unknown, the solicitation code will show "U" - Unknown and the award code will show "U" - Unknown. The file number will be deleted. The requisition header will be updated with solicitation number equal spaces and status changed to 304 REQUISITION UNATTACHED. The file number will be deleted from all requisitions un-attached from the solicitation except for the last requisition unattached. Additionally, the solicitation requisition table will be updated removing the sequence and requisition number deleted for the entered solicitation number.

## 2.3 Inquire Solicitation Requisition Number

**Overview**

The AGPS user is provided the capability to inquire solicitation requisition number(s) in AGPS. This is accomplished by the use of the SRQN screen.

**Inputs**

- Required solicitation number
- Required sequence number
- Required requisition number

**Outputs**

- Display of requested SRQN Table record

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation number for review of attached requisition(s). |
| SDOC 4: SRQN | **Solicitation Number** must be key to a valid record in the SRQN Table. |
| | **Requisition Number** must be key to a valid record in the SRQN Table. |
| | 2. Inquire SRQN Table data in AGPS. |
| SDOC 4: SRQN | a. If the user is not in the SRQN screen, type **SRQN** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using the TAB key, move to Sequence Number field and type desired sequence number. If blank, inquire will display first sequence in the table. |
| | e. Using the TAB key, move to Requisition field and type desired requisition number. May be blank on inquire. |
| | 3. Press RETURN/ENTER. |

Cross-Reference Steps

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display the requested solicitation requisition number record.

# 3 PREPARE SOLICITATION FOR MAILING AND/OR POSTING

AGPS provides the flexibility for the buyer to tailor the solicitation to the specific purchase being processed. To do this, certain data elements must be set on the solicitation. Following is a discussion of these data elements.

## 3.1 Bid Bonds

**Overview**

The AGPS user is provided the capability to establish and maintain bid bond requirements of a solicitation in AGPS. This is accomplished by the use of the SDO2 screen.

**Inputs**

- Required solicitation number
- Required bid bond information

**Outputs**

- Updated SDOC Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation bid bond requirement. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active record in the SDOC Table. |
| | 2. Establish bid bond requirement for a solicitation in AGPS. |
| SDOC 4: SDO2 | a. If the user is not in the SDO2 screen, type **SDO2** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |
| | 3. Type CHANGE in the Function Line. |

Cross-Reference Steps

a. Using the TAB key, move to Bid Bond Required field and type **Y**.

b. Using the TAB key, move to Bid Bond Percent field and type desired percentage for bid bond. If bid bond amount is greater than spaces, this field must be blank.

c. Using the TAB key, move to Bid Bond Amount field and type desired amount for bid bond. If bid bond percent is greater than spaces, this field must be blank.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

## 3.2 Performance Bonds

**Overview**

The AGPS user is provided the capability to establish and maintain performance bond requirements of a solicitation in AGPS. This is accomplished by the use of the SDO2 screen.

**Inputs**

- Required solicitation number
- Required performance bond information

**Outputs**

- Updated SDOC Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation performance bond requirement. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active record in the SDOC Table. |
| | 2. Establish performance bond requirement for a solicitation in AGPS. |
| SDOC 4: SDO2 | a. If the user is not in the SDO2 screen, type **SDO2** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |
| | 3. Type CHANGE in the Function Line. |
| | a. Using the TAB key, move to Perf Bond Required field and type **Y**. |
| | b. Using the TAB key, move to Perf Bond Percent field and type desired percentage for performance bond. If performance bond amount is greater than spaces, this field must be blank. |

| Cross-Reference | Steps |
|---|---|

c. Using the TAB key, move to Perf Bond Amount field and type desired amount for performance bond. If performance bond percent is greater than spaces, this field must be blank.

d. Using the TAB key, move to Perf Bond Due Days and type desired number of days before the performance bond is due.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

## 3.3 Pre-Bid Mailing

**Overview**

The AGPS user is provided the capability to preview the bidder's list prior to mailing the solicitation. The purpose of this would be to limit the vendors that would receive a solicitation, rather than mailing the solicitation to all vendors on the bid list. This is accomplished by the use of the SD02 screen.

**Inputs**

- Required solicitation number
- Required pre-bid mailing indicator

**Outputs**

- Updated SDOC Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation pre-bid mailing requirement. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active record in the SDOC Table. |
| | 2. Establish pre-bid mailing list for a solicitation in AGPS. |
| SDOC 4: SDO2 | a. If the user is not in the SDO2 screen, type **SDO2** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |
| | 3. Type CHANGE in the Function Line. |
| | a. Using the TAB key, move to Pre-Bid Indicator field and type **A** or **I**. |
| | NOTE: Typing **A** will activate all vendors. User would then inactivate the vendors who will not be sent a solicitation. Typing **I** will inactivate all vendors. User would then activate the vendors who will be sent a solicitation. |

| Cross-Reference | Steps |
|---|---|
| | 4. Press RETURN/ENTER.<br><br>NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |
| | 5. Following the procedures of 4.6 Generating Bid List Without Solicitation Print, or 6.1 Print Draft Solicitation, create a pre-bid mailing list or draft solicitation. |
| | 6. Review the draft bid list and determine the vendors to be mailed a solicitation. |
| SDOC 4: SVE2 | 7. Following the procedures of 4.5 Inactivating Selected Vendors, the vendor status can be changed to inactivate a vendor so that vendor would not receive a solicitation, (change status code to 7) or to activate a vendor (change status code to 1) so that vendor will receive a solicitation. |

## 3.4 Notice to Bidders

**Overview**

The AGPS user is provided the capability to send a Notice to Bidders to the vendors on the bidder's list rather than a solicitation. The purpose of this is to reduce mailing costs for lengthy solicitations by selecting the vendors that would receive a solicitation, and sending a Notice to the rest of the vendors on the bid list. This is accomplished by the use of the SD02 screen.

**Inputs**

- Required solicitation number
- Required pre-bid mailing indicator

**Outputs**

- Updated SDOC Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation notice to bidders requirement. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active record in the SDOC Table. |
| | 2. Establish notice to bidders requirement for a solicitation in AGPS. |
| SDOC 4: SDO2 | a. If the user is not in the SDO2 screen, type **SDO2** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |
| | 3. Type CHANGE in the Function Line. |
| | a. Using the TAB key, move to Pre-Bid Indicator field and type **B**. |
| | 4. Press RETURN/ENTER. |

| Cross-Reference | Steps |
|---|---|
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |
| | 5. Following the procedures of 4.6 Generating Bid List Without Solicitation Print, or 6.1 Print Draft Solicitation, create a pre-bid mailing list or draft solicitation. |
| | NOTE: If all vendors are to receive a Notice to Bidder, user can skip these steps and follow the procedures of 6.2 Print/Issue Final Solicitation. All vendors selected by the system will receive a Notice to Bidders. |
| | 6. Review the draft bid list and determine the vendors to be mailed a solicitation and the vendors to be mailed a Notice to Bidders. |
| SDOC 4: SVE2 | 7. Following the procedures of 4.5 Inactivating Selected Vendors, the vendor status can be changed. All vendors will have a status code of 6 for a Notice to Bidders. For those vendors that are to receive a solicitation, change the status code to **1**. |
| | When a final solicitation is printed, vendors with a status of 1 will receive a solicitation, and vendors with a status of 6 will receive a Notice to Bidders. |

# 3.5 Scheduling

## Overview

The AGPS user is provided the capability to establish and maintain a processing schedule for a solicitation in AGPS. At this point the buyer has the option of scheduling the solicitation. When scheduling a solicitation, three major events occur. First, the document type and nature of purchase are used to retrieve the procurement lead time table (BSTD). The document type and nature of purchase result from the characteristics of the requisition and how it is being purchased. Second, the procurement lead times in the BSTD Table are accepted or decreased by the priority. Priority 3 is routine. Priority 2 decreases the procurement lead times by 25%. Priority 1 decreases the procurement lead times by 50%. Priority is an expression of the urgency of need. Third, the degree of difficulty is used to express all other characteristics associated with the requisition, such as the other workload of the buyer, the capabilities of the buyer, the buyer's work schedule, etc. A degree of difficulty of 1.0 is routine and the schedule is not affected. A degree of difficulty of 1.2 adds 20% to the procurement lead times. A degree of difficulty of .7 reduces the procurement lead times by 30%. Using these three parameters, AGPS will generate a schedule. Any change to the scheduled dates will be checked against the Holiday Table (BHOL); if a scheduled date is in the BHOL table, AGPS will display an error message. This will continue until the revised scheduled date is not in the BHOL table. This is accomplished by the use of the SDO2 screen.

## Inputs

- Required solicitation number
- Required nature of purchase
- Required priority
- Required degree of difficulty

## Outputs

- Updated SDOC Table

## Completing The Procedure

Cross-Reference Steps

1. Determine solicitation scheduling requirement.

   NOTE: The buyer should set these parameters to accurately express the circumstances of the solicitation and its processing. A solicitation may be scheduled many times while in the scheduling mode. Once

| Cross-Reference | Steps |
|---|---|
| | the status code is changed to indicate other processing, the schedule is "frozen" and it may never be rescheduled. Individual revised schedule dates may be keyed to change the schedule, but the original schedule will always remain intact. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active record in the SDOC Table. |
| INST 4: BTAB | **Nature of Purchase** must be key to a valid entry in BTAB Table NP (Nature of Purchase). |
| INST 4: BSTD | **Solicitation Document Type and Nature of Purchase** must be key to a valid record in BSTD Table. |
| | 2. Scheduling a solicitation in AGPS. |
| SDOC 4: SDO3 | a. If the user is not in the SDO3 screen, type **SDO3** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |
| | 3. Type CHANGE in the Function Line. |
| | a. Using the TAB key, move to Status Code field and type **330**. |
| | b. Using the TAB key, move to Nature Of Purchase field and type desired nature of purchase. |
| | c. Using the TAB key, move to Priority Code field and type desired priority code. |
| | d. Using the TAB key, move to Degree of Difficulty field and type desired degree of difficulty. |
| | 4. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error |

| Cross-Reference | Steps |
| --- | --- |
| | conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |

# 3.6 Revising Scheduling

**Overview**

The AGPS user is provided the capability to revise a processing schedule for a solicitation in AGPS if scheduled dates become un-realistic or un-attainable. The solicitation status must be less than 361. This is accomplished by the use of the SDO3 screen.

**Inputs**

- Required solicitation number
- Required revised processing dates

**Outputs**

- Updated SDOC Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine revisions of solicitation schedule. This process will be used after solicitation has been scheduled and other processing performed, i.e., draft solicitation print. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active record in the SDOC Table. |
| | 2. Scheduling a solicitation in AGPS. |
| SDOC 4: SDO3 | a. If the user is not in the SDO3 screen, type **SDO3** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |
| | 3. Type CHANGE in the Function Line. |
| | a. Using the TAB key, move to Revised Issue Date field and type desired revised issue date. |

| Cross-Reference | Steps |
|---|---|

b. Using the TAB key, move to Revised Bid Open Date field and type desired revised bid open date.

c. Using the TAB key, move to Revised Bid Open Time field and type desired revised bid open time.

d. Using the TAB key, move to Revised Begin Evaluation field and type desired revised begin evaluation date.

e. Using the TAB key, move to Revised Award field and type desired revised award date.

f. Using the TAB key, move to Revised NOA Issue Date field and type desired revised NOA issue date.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

## 3.7 Conferences

**Overview**

The AGPS user is provided the capability to establish and maintain conference requirements of a solicitation in AGPS. AGPS provides the ability to set up three conferences on a solicitation such as pre-bid conference, site visit and post-award conference. The schedule and locations for these conferences are keyed into AGPS and will print on the solicitation. This is accomplished by the use of the SDO4 screen.

**Inputs**

- Required solicitation number
- Required conference data

**Outputs**

- Updated SDOC Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation conference requirement(s). |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active record in the SDOC Table. |
| INST 4: BTAB | **Conference Code** must be key to a valid entry in BTAB Table TC (Type Conference). |
| | 2. Establish conference requirement(s) for a solicitation in AGPS. |
| SDOC 4: SDO4 | a. If the user is not in the SDO4 screen, type **SDO4** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |
| | 3. Type CHANGE in the Function Line. |
| | a. Using the TAB key, move to first available Conference Code field and type desired conference code. |

Cross-Reference Steps

b. Using the TAB key, move to first available Conference Date field and type desired conference date.

c. Using the TAB key, move to first available Conference Time field and type desired conference time.

d. Using the TAB key, move to first available Conference Address Line 1 field and type desired conference address. Address line 2 - 4 are optional.

NOTE: Repeat the above steps for each conference to be identified as a solicitation requirement.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

## 3.8 Certificates

**Overview**

The AGPS user is provided the capability to establish and maintain certificate requirements of a solicitation in AGPS. AGPS provides the ability to request up to five certificates on a solicitation such as insurance, food inspection, etc. Some of the certificates have effective periods while others have dollar amounts associated with them. This is accomplished by the use of the SDO5 screen.

**Inputs**

- Required solicitation number
- Required certificate type

**Outputs**

- Updated SDOC Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation conference requirement(s). |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active record in the SDOC Table. |
| INST 4: BTAB | **Certificate Type** must be key to a valid entry in BTAB Table TR (Type Certificate). |
| | 2. Establish certificate requirement(s) for a solicitation in AGPS. |
| SDOC 4: SDO5 | a. If the user is not in the SDO5 screen, type **SDO5** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |
| | 3. Type CHANGE in the Function Line. |
| | a. Using the TAB key, move to first available Certificate Type field and type desired certificate type. |

| Cross-Reference | Steps |
|---|---|

b. Using the TAB key, move to first available Certif Amount field and type desired certificate amount (dollars/cents).

c. Using the TAB key, move to first available Certif Due Date field and type desired certification due date.

d. Using the TAB key, move to first available Certif From Date field and type desired certificate effective (begin) date.

e. Using the TAB key, move to first available Certif To Date field and type desired certificate expiration (end) date.

NOTE: Repeat the above steps for each certificate to be identified as a solicitation requirement.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

## 3.9 Price Sheet Styles And Headers

**Overview**

The AGPS user is provided the capability to establish and maintain price sheet style requirements of a solicitation or solicitation line in AGPS. AGPS provides the capability to select up to four price sheet styles - two vertical and two horizontal. The prices sheet style may be set on the solicitation header record and on the detail line record. Each line on a solicitation may have one of the price sheet styles. If a line does not have a price sheet style, AGPS defaults to the price sheet style on the solicitation header. This is accomplished with use of SDOC (Solicitation Default) or RLI3 (Solicitation/Requisition Line). Additionally, the user may change/modify the price sheet header text for the style(s) selected by use of SD06.

**Inputs**

- Required solicitation number
- Required price sheet style

**Outputs**

- Updated SDOC/RLIN Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation/solicitation line price sheet style requirement(s) and desired header text for each style. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active record in the SDOC Table. |
| INST 4: BTAB | **Price Sheet Style (Type)** must be key to a valid entry in BTAB Table PS (Price Sheet Type). |
| | 2. Establish price sheet style requirement for a solicitation in AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |

| Cross-Reference | Steps |
|---|---|
| | 3. Type CHANGE in the Function Line. |
| | a. Using the TAB key, move to Type Price Sheet field and type desired price sheet type. |
| | 4. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |
| | 5. Establish price sheet style requirement(s) for solicitation line(s) in AGPS. |
| RQSN 4: RLI3 | a. If the user is not in the RLI3 screen, type **RLI3** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Requisition Number field and type desired solicitation requisition number. |
| | d. Using the TAB key, move to Line Number field and type desired solicitation requisition line number. |
| | e. Press RETURN/ENTER. Requested requisition line record should be displayed. |
| | 6. Type CHANGE in the Function Line. |
| | a. Using the TAB key, move to Price Sheet Style field and type desired price sheet type. |
| | 7. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |
| | 8. Change/Modify price sheet header text for a solicitation in AGPS. |

| Cross-Reference | Steps |
|---|---|
| SDOC 4: SDO6 | a. If the user is not in the SDO6 screen, type **SDO6** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed with default price sheet header text for the four types/styles of price sheets. |
| | 9. Type CHANGE in the Function Line. |
| | a. Using the TAB key, move to the desired header text field for the desired type/style of price sheet and type the desired header text replacing existing text. |
| | NOTE: Header text changes will effect only this solicitation. If same changes are desired on another solicitation, these same changes must be made in the SDO6 screen for that solicitation. |
| | 10. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |

# 3.10 Attach Terms & Conditions And Specifications

## Overview

The AGPS user is provided the capability to attach special terms and conditions and/or additional specifications to a solicitation and have the option to print the text on the awarded documents. AGPS provides the capability to attach text from the Text database to a solicitation, modify the text for the solicitation if necessary, determine the sequence the text will print on the solicitation, and if required, print the text on the award documents. Any modifications made do not update the Text database.

There are two basic types of text the buyer would attach to a solicitation: terms and conditions and general specifications. Text is attached to the solicitation by using the reference number from the Text database. This six position field is key to the Text database and contains an alpha character in the first position for terms and conditions. A number in the first position designates a general specification. All text attached to the solicitation will print on the solicitation. All text that has a "Y" in the print field will print on the award documents. This is accomplished with STXT and STXL.

## Inputs

- Required solicitation number
- Required print indicator (N/Y)
- Required text references
- Required changes to text reference text lines

## Outputs

- Updated STXT/STXL Table

## Completing The Procedure

Cross-Reference Steps

1. Determine solicitation terms and conditions and/or specification text requirements and any possible changes to that text.

   Terms and conditions describe the legal environment of the solicitation. General specifications are used to describe the product or service at the sub-class or item level. Remember, any text references on COM2 in the commodity database will automatically print and should not be duplicated in STXT. Also, commodity agency text (text referenced on CATX), and requisition text (text referenced on RTXT) should not be duplicated in STXT. Item descriptions are carried in the commodity database as well.

| Cross-Reference | Steps |
|---|---|
| | Before attaching any text to the solicitation, it would be reasonable to select all text references, determine the sequence the text is to be printed, if it is to print on the award documents, and then attach them to the solicitation. This process may save several printings of the draft solicitation. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active record in the SDOC Table. |
| TEST 4: TEXT | **Text Reference** must be key to a valid and active text record in the TEXT Table. |
| | 2. Attach text to a solicitation in AGPS. |
| SDOC 4: STXT | a. If the user is not in the STXT screen, type **STXT** in the Function Line and press RETURN/ENTER. |
| | b. Type **CLEAR** in the Function Line and press RETURN/ENTER. Data entry fields of the screen should be blanked and **ADD** inserted in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using the TAB key, move to the print field and type N/Y. Will default to "N" if left blank. |
| | e. Using the TAB key, move to Text From field and type desired text reference number to identify the text record to be printed. |
| | f. Using the TAB key, move to Text To field and type desired text reference number to identify the ending text record to be printed. This would be used only if the text references are in a range, and the entire range is to be printed. |
| | 3. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |
| | 4. Delete attached text references for a solicitation in AGPS. The text reference numbers serve as keys therefore they cannot be changed. If the user wishes to change them, they must be deleted and added as another key. The only change allowed on this screen is the print indicator, N/Y. |

| Cross-Reference | Steps |
|---|---|
| SDOC 4: STXT | a. If the user is not in the STXT screen, type **STXT** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using the TAB key, move to Text From field and type desired text reference number. May be left blank on inquire. If blank on inquire, record will return with first text reference in the database for that solicitation. |
| | e. Press RETURN/ENTER. Requested record should be displayed. |
| | 5. Type DELETE in the Function Line. If all text references are to be deleted, proceed to step 6. |
| | a. Using the TAB key, move to the From Text reference field that is not to be deleted and space out the text reference. If text reference is present on delete, record will be deleted. |
| | 6. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |
| | 7. Inquire attached text references for a solicitation in AGPS. |
| SDOC 4: STXT | a. If the user is not in the STXT screen, type **STXT** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using the TAB key, move to Text From field and type desired text reference number. May be left blank on inquire. If blank on inquire, record will return with first text reference in the database for that solicitation. |

| Cross-Reference | Steps |
|---|---|

8. Press RETURN/ENTER.

   NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

9. Modify/change attached text reference's text for a solicitation in AGPS. Terms and conditions and general specifications may be modified for a particular solicitation without affecting the master record in the Text database. If a permanent change to the text is warranted, see Section 5, Text Database Maintenance for instructions on updating text in the Text database.

SDOC 4: STXL

   a. If the user is not in the STXL screen, type **STXL** in the Function Line and press RETURN/ENTER.

   b. Type **G (GET)** in the Function Line.

   c. Using TAB key, move to Solicitation Number field and type desired solicitation number.

   d. Using TAB key, move to From Text Ref field and type desired solicitation text reference number.

   e. Using TAB key, move to To Text Ref field and delete any existing text reference number. This field must be blank.

   f. Using TAB key, move to Text Action field and type desired text action. See Section 15, Miscellaneous Processing, General Text Processing, Chapter 2 for additional information.

10. Press RETURN/ENTER. The text screen should be formatted with null (.) lines. If text is present, the text should be formatted to the screen.

    NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display text for requested solicitation number and text reference number.

    a. Type **C (CHANGE)** in the Function Line.

    b. Using TAB key, move to the first text or null (.) line. Type the desired text. Text lines are seventy characters in length. A null (.) line cannot exist between text lines, (.) must be spaced out.

11. Press RETURN/ENTER.

| Cross-Reference | Steps |
|---|---|
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'ALL LINES CHANGED'. |
| | 12. Delete/Insert attached text reference's text lines for a solicitation in AGPS. |
| SDOC 4: STXL | a. If the user is not in the STXL screen, type **STXL** in the Function Line and press RETURN/ENTER. |
| | b. Type **G (GET)** in the Function Line. |
| | c. Using TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using TAB key, move to From Text Ref field and type desired solicitation text reference number. |
| | e. Using TAB key, move to To Text Ref field and delete any existing text reference number. This field must be blank. |
| | f. Using TAB key, move to Text Action field and type desired text action. See Section 15, Miscellaneous Processing, General Text Processing, Chapter 2 for additional information. |
| | 13. Press RETURN/ENTER. The text screen should be formatted with null (.) lines. If text is present, the text should be formatted to the screen. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display text for requested solicitation number and text reference number. |
| | a. Type **C (CHANGE)** in the Function Line. |
| | b. Using the TAB key, move to the Text Action field and type **X (to delete)**, OR **I (to insert)**. |
| | c. Using the TAB key, move to the Line Number field and enter the text line(s) to be deleted (as a single line, i.e., 1, 2, etc., or a line range 1-4, or ALL (all lines)) **or**, if inserting text, insert the text line number after which text is to be inserted. |
| | 14. Press RETURN/ENTER. |

Cross-Reference Steps

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'PREVIOUS UPDATE SUCCESSFUL'.

**X** will result in the deletion of the text line numbers specified in the Line Number field. If the action was **X**, the text screen will return with all lines that were not deleted. If the action was "X ALL", skip to step 4.c. Before using the "X ALL" function, please be sure you do not need the text.

**I** indicates that the user desires to insert line(s) of text after the line of text identified in the Line Number field. If the action was **I**, the text screen will return with the line identified in the line number field followed by blank (null (.)) lines ready for text to be entered. Remember, the line number is the position of the line on the screen, and will be one or more of the numbers 1 through 9.

a. If inserting text, type **C (CHANGE)** in the function line.

b. Using the TAB key, move to the first null (.) line and type desired text. A null (.) line cannot exist between text lines, (.) must be spaced out. Skip to step 5.

c. If overwriting existing text, with "CHANGE" still in the Function Line, tab to the Line Number field and enter "UPLD". The UPLD process is required for text screens that pull a text description from a text data base (i.e. commodity data base CSPC or text data base TXLN). When using screens that access these text data bases (i.e. RMOD - OMOD - OCMD - KMOD - STXL) and the user needs to delete ALL text lines and completely overwrite the existing description from a text data base, the UPLD (upload) process must be followed. Using the TAB key, move to the first null (.) line and type desired text.

15. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'PREVIOUS UPDATE SUCCESSFUL'.

## 3.11 Attachment Text

**Overview**

The AGPS user is provided the capability to create and maintain attachment text for entry of additional solicitation text for a solicitation in AGPS. AGPS provides the capability for the buyer to enter text, via SATT, of any nature and have it print on the solicitation. This text may be informational in nature or legally binding. This accomplished with SATT.

**Inputs**

- Required solicitation number
- Required attachment text

**Outputs**

- Updated SATT Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation attachment text requirements. |
| | 2. Add attachment text for a solicitation in AGPS. |
| SDOC 4: SATT | a. If the user is not in the SATT screen, type **SATT** in the Function Line and press RETURN/ENTER. |
| | b. Type **G (GET)** in the Function Line. |
| | c. Using TAB key, move to Solicitation Number field and type desired solicitation number. |
| | 3. Press RETURN/ENTER. The text screen should be formatted with null (.) lines. If text is present, the text should be formatted to the screen. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display text for requested solicitation number. |
| | a. Type **C (CHANGE)** in the Function Line. |

| Cross-Reference | Steps |
|---|---|
| | b. Using TAB key, move to the first text or null (.) line. Type the desired text. Text lines are seventy characters in length. A null (.) line cannot exist between text lines, (.) must be spaced out. |
| | 4. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'ALL LINES CHANGED'. |
| | 5. Change/Modify attachment text for a solicitation in AGPS. |
| SDOC 4: SATT | a. If the user is not in the SATT screen, type **SATT** in the Function Line and press RETURN/ENTER. |
| | b. Type **G (GET)** in the Function Line. |
| | c. Using TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using TAB key, move to Text Action field and type desired text action. See Section 15, Miscellaneous Processing, General Text Processing, Chapter 2 for additional information. |
| | 6. Press RETURN/ENTER. The text screen should be formatted with null (.) lines. If text is present, the text should be formatted to the screen. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display text for requested solicitation number. |
| | a. Type **C (CHANGE)** in the Function Line. |
| | b. Using TAB key, move to the first text or null (.) line. Type the desired text. Text lines are seventy characters in length. A null (.) line cannot exist between text lines, (.) must be spaced out. |
| | 7. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'ALL LINES CHANGED'. |

| Cross-Reference | Steps |
|---|---|

8. Delete/Insert attachment text lines for a solicitation in AGPS.

SDOC 4: SATT

a. If the user is not in the SATT screen, type **SATT** in the Function Line and press RETURN/ENTER.

b. Type **G (GET)** in the Function Line.

c. Using TAB key, move to Solicitation Number field and type desired solicitation number.

d. Using TAB key, move to Text Action field and type desired text action. See Section 15, Miscellaneous Processing, General Text Processing, Chapter 2 for additional information.

9. Press RETURN/ENTER. The text screen should be formatted with null (.) lines. If text is present, the text should be formatted to the screen.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display text for requested solicitation number.

a. Type **C (CHANGE)** in the Function Line.

b. Using the TAB key, move to the Text Action field and type **X (to delete)**, OR **I (to insert)**.

c. Using the TAB key, move to the Line Number field and enter the text line(s) to be deleted (as a single line, i.e., 1, 2, etc., or a line range 1-4, or ALL (all lines)) **or**, if inserting text, insert the text line number after which text is to be inserted.

10. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'PREVIOUS UPDATE SUCCESSFUL'.

**X** will result in the deletion of the text line numbers specified in the Line Number field. If the action was **X**, the text screen will return with all lines that were not deleted. If the action was "X ALL", skip to step 4.c. Before using the "X ALL" function, please be sure you do not need the text.

Cross-Reference Steps

**I** indicates that the user desires to insert line(s) of text after the line of text identified in the Line Number field. If the action was **I**, the text screen will return with the line identified in the line number field followed by blank (null (.)) lines ready for text to be entered. Remember, the line number is the position of the line on the screen, and will be one or more of the numbers 1 through 9.

a. If inserting text, type **C (CHANGE)** in the function line.

b. Using the TAB key, move to the first null (.) line and type desired text. A null (.) line cannot exist between text lines, (.) must be spaced out. Skip to step 5.

c. If overwriting existing text, with "CHANGE" still in the Function Line, tab to the Line Number field and enter "UPLD". The UPLD process is required for text screens that pull a text description from a text data base (i.e. commodity data base CSPC or text data base TXLN). When using screens that access these text data bases (i.e. RMOD - OMOD - OCMD - KMOD - STXL) and the user needs to delete ALL text lines and completely overwrite the existing description from a text data base, the UPLD (upload) process must be followed. Using the TAB key, move to the first null (.) line and type desired text.

11. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'PREVIOUS UPDATE SUCCESSFUL'.

# 4 CREATE/CHANGE SOLICITATION BIDDER LISTS

AGPS provides a full range of vendor selection capabilities. Vendors will be automatically selected based upon the criteria set on the SDOC transaction for the solicitation. However, if an agency has established its own agency bid list using CASV, or established set-aside categories using CASA, vendor selection will follow that criteria.

The first criteria used to select vendors is the class and sub-class of the commodities or services being purchased. AGPS uses the classes and sub-classes from the solicitation lines to retrieve the vendors registered as suppliers. Additional classes/subclasses can be added on SD02 if necessary. As the second criteria, AGPS retrieves only those vendors who are active as a supplier and active as a vendor. Finally, as the third criteria, AGPS selects only those vendors who satisfy the Set-Aside Code entered on the solicitation (SDOC). The codes are listed in BTAB Table SA.

NOTE: Vendors selected for one commodity may not be able to bid on another commodity on the same solicitation (different sub-classes). However, all vendors selected for all commodities on a solicitation will be merged into a single bidders list.

## 4.1 Set Asides

**Overview**

The AGPS user is provided the capability to establish and maintain set asides for selection of bidding vendor(s) for a solicitation in AGPS. This is accomplished by the use of the SDOC screen.

**Inputs**

- Required solicitation number
- Required set aside code

**Outputs**

- Updated SDOC Table

**Completing The Procedure**

Cross-Reference Steps

1. Determine solicitation set aside code for vendor selection.

   NOTE: When a requisition that has been designated as a set-aside is attached to a solicitation, the set-aside code of the requisition is defaulted to the set-aside code of the solicitation. The buyer then has the option of changing the set-aside code.

| Cross-Reference | Steps |
|---|---|
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active record in the SDOC Table. |
| INST 4: BTAB | **Set Aside Code** must be a valid entry in BTAB Table SA (Set Aside Type). |

2. Establish set aside for a solicitation in AGPS.

SDOC 4: SDOC

a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER.

b. Type **INQUIRE** in the Function Line.

c. Using the TAB key, move to Solicitation Number field and type desired solicitation number.

d. Press RETURN/ENTER. Requested solicitation record should be displayed.

3. Type CHANGE in the Function Line.

a. Using the TAB key, move to Set Aside Code field and type desired set aside code.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

## 4.2 Geographical Bid Regions

**Overview**

The AGPS user is provided the capability to establish and maintain vendor selection criteria known a geographical bid regions. When a geographical bid region is identified on a solicitation, only those selected vendors which have been registered for bidding in the geographical bid region will appear on the solicitations bid list. This is accomplished by the use of the SDO2 screen.

**Inputs**

- Required geographical bid region code

**Outputs**

- Updated SDOC Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine the solicitation's geographical bidding region(s). The geographic bid region(s) entered on RQS5 by the requisitioning agency will be defaulted to the SD02 screen. It is the buyer's responsibility to check the ship to addresses and verify that the correct geo bid codes are used.<br><br>NOTE: A vendor may be added to the bid list before or after the final solicitation is issued or after the bids are opened. It is important to note that all vendors not on the original bid list, who request a copy of the bid, may be manually added to the bid list so these vendors will receive any amendments that are issued. See 4.3 Manually Selected Vendors. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active record in the SDOC Table. |
| INST 4: BTAB | **GEO Bid Code** must be a valid entry in BTAB Table GC (GEO Bid Code). |
| | 2. Entering GEO Bid Code(s) for a solicitation in AGPS. |
| SDOC 4: SDO2 | a. If the user is not in the SDO2 screen, type **SDO2** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |

Cross-Reference Steps

d. Press RETURN/ENTER. Requested solicitation number record should be displayed on the screen.

3. Type **CHANGE** in the Function Line.

a. Using the TAB key, move to GEO Bid Code field and type desired geographical bid code(s). Up to 8 codes can be selected.

NOTE: The buyer has the option of changing the defaulted region codes. However, R0 can not be combined with R1-R8. Also, when attaching multiple requisitions to a solicitation, if the 1st requisition attached has a region code of R0, the subsequent requisitions attached must also be R0.

The BS3X program which selects the vendors to receive a solicitation will select vendors registered as follows:

| SDO2 | Vendors registered in Regions(s): |
|---|---|
| R0 | R0 |
| R1 | R1, R0 |
| R2 | R2, R0 |
| R3 | R3, R0 |
| R4 | R4, R0 |
| R5 | R5, R0 |
| R6 | R6, R0 |
| R7 | R7, R0 |
| R8 | R8, R0 |

Region R0 on the solicitation should only be used for requisitions which require deliveries to be made statewide, such as a statewide contract. Using R0 differs from using all of R1 through R8 in that using R1 through R8 will get all the vendors in each of the areas who have registered for a class/subclass; R0 will only get the vendors who have said they could deliver statewide.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

## 4.3 Manually Selected Vendors

**Overview**

The AGPS user is provided the capability to establish and maintain bidding vendors manually for a solicitation in AGPS. This is accomplished by the use of the SVE2 screen.

**Inputs**

- Required solicitation number
- Required bidding vendor code

**Outputs**

- Updated SVEN Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation bidding vendor to add manually. |
| | There are several reasons why a buyer may want to add vendors to the AGPS generated bid list. This may be done by adding vendors to the solicitation vendor table. If the vendor is properly registered as a supplying vendor and meets the selection criteria established by the solicitation, there is no need to add the vendor manually because AGPS will automatically select the vendor. |
| | A vendor may be added to the bid list before or after the final solicitation is issued or after the bids are opened. It is important to note that all vendors not on the original bid list, who request a copy of the bid, may be manually added to the bid list so these vendors will receive any amendments that are issued. For all manually added vendors, the source code on the solicitation vendor record will show that the vendor was manually added and the status will show the step in the solicitation process the vendor was added. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active record in the SDOC Table. |
| VEND 4: VEND | **Vendor Number** must be key to a valid and active record in the VEND Table. |
| INST 4: BTAB | **Source Code** must be a valid entry in BTAB Table SC (Vendor Source Code). |
| | 2. Manually add bidding vendor for a solicitation in AGPS. |
| SDOC 4: SVE2 | a. If the user is not in the SVE2 screen, type **SVE2** in the Function Line and press RETURN/ENTER. |

Cross-Reference Steps

b. Type **CLEAR** in the Function Line and press RETURN/ENTER. Screen data entry fields should be blanked and **ADD** inserted in the Function Line.

c. Using the TAB key, move to Solicitation Number field and type desired solicitation number.

d. Using the TAB key, move to Vendor Number field and type desired vendor number.

e. Using the TAB key, move to Coop Procurement field and type desired cooperative procurement indicator. Allowed entries are **Y** and **N**.

3. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

## 4.4 User Selected Vendors

**Overview**

The AGPS user is provided the capability to establish and maintain recommended bidding vendors for a requisition to processed for solicitation in AGPS. The user who created the requisition may have added recommended vendors to the requisition (see RQS5 transaction), these vendors will be automatically added to the bid list by AGPS. This is accomplished by the use of the RQS5 screen. If the buyer does not want to solicit these vendors, the buyer may inactivate them using the procedure in paragraph 4.5 below.

**Inputs**

- Required requisition number
- Required bidding vendor code

**Outputs**

- Updated RQSN/SVEN Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine requisition to add recommended vendors for solicitation processing. |
| | 2. User add bidding vendor for a requisition to be processed for solicitation in AGPS.<br><br>See Section 6, Requisition Processing, Chapter 2, 1.5 Add/Change Requisition Recommended Vendor(s)/Geo Bid Codes. |
| | 3. Process solicitation for generation of bidding vendor list. Recommended vendors will be added to SVEN. |

## 4.5 Inactivating Selected Vendors

**Overview**

The AGPS user is provided the capability to inactivate selected vendors for a solicitation in AGPS to prevent issuance of a solicitation document to that vendor. There may be a number of reasons why a vendor should be inactivated after being added to the bid list. In order to inactivate a vendor, the buyer should change the solicitation vendor status code to 7, 8, or 9. Once a vendor is inactivated, that vendor will not receive a solicitation, any amendments or have bids recorded in AGPS. This is accomplished by the use of the SVE2 screen.

**Inputs**

- Required solicitation number
- Required bidding vendor code
- Required bidding vendor status code

**Outputs**

- Updated SVEN Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine a solicitation's bidding vendor to be inactivated. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active record in the SDOC Table. |
| SDOC 4: SVEN | **Solicitation Number** must be key to a valid and active record in the SVEN Table.<br><br>**Vendor Number**, combined with the solicitation number, must be key to a valid and active record in the SVEN Table. |
| | 2. Inactivating a bidding vendor SVEN record in AGPS. |
| SDOC 4: SVE2 | a. If the user is not in the SVE2 screen, type **SVE2** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |

Cross-Reference Steps

d. Using the TAB key, move to Vendor Number field and type desired vendor number.

e. Press RETURN/ENTER. Requested solicitation vendor record should be displayed.

3. Type **CHANGE** in the Function Line.

a. Using the TAB key, move to Status Code field and type desired status code.

| If ... | Then ... |
|---|---|
| Inactivated before bid mailed | Type status code = **7** |
| Inactivated after bid mailed | Type status code = **8** |
| Inactivated after bid opened | Type status code = **9** |

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

## 4.6 Generating Bid List Without Solicitation Print

**Overview**

The AGPS user is provided the capability to generate solicitation pre-bid mailing lists without printing a solicitation document in AGPS. AGPS will automatically create a pre-bid mailing list based upon the criteria on the solicitation record. The vendors are chosen based upon the commodity classes/sub-classes being purchased and the vendor selection codes. This is accomplished by the use of the SDOC screen.

**Inputs**

- Required solicitation number
- Required status code

**Outputs**

- Updated SDOC/SVEN Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation for which a bid list will be generated prior to solicitation print. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active record in the SDOC Table. |
| | 2. Generating bidding vendor list without solicitation print in AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation vendor record should be displayed. |
| | 3. Type **CHANGE** in the Function Line. |
| | a. Using the TAB key, move to Status Code field and type **335**. |
| | 4. Press RETURN/ENTER. |

Cross-Reference Steps

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

## 4.7 Automatically Select Vendors

**Overview**

The AGPS user is provided the capability to automatically select vendors as part of the normal solicitation processing in AGPS. This is accomplished by the use of the SDOC screen.

**Inputs**

- Required solicitation number
- Required status code

**Outputs**

- Updated SDOC/SVEN Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation for which a bid list will be generated automatically.<br><br>This is accomplished by changing the status code of the solicitation to print a draft (350) or final solicitation (360). At these status codes, AGPS will automatically create a bid list based upon the criteria on the solicitation record. The vendors are chosen based upon the commodity classes/sub-classes being purchased and the vendor selection codes. The bid list prepared during the draft printing process may be updated depending upon the status of the vendors and changes in the selection criteria. See paragraphs 4.1 - 4.5 above. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active record in the SDOC Table. |
| | 2. Generating bidding vendor list automatically with solicitation print in AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation vendor record should be displayed. |
| | 3. Type **CHANGE** in the Function Line. |

| Cross-Reference | Steps |
|---|---|

a. Using the TAB key, move to Status Code field and type **350 or 360**.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

During the nightly processing the bidding vendor bid lists will automatically be generated for that solicitation.

# 5 ADD/CHANGE SOLICITATION APPROVALS

## 5.1 Solicitation Approval Processing

**Overview**

The AGPS user is provided the capability to add/change and/or approve solicitation approval records. The system is designed to automatically create all required solicitation approvals when an add and/or change is processed for the solicitation header. The user also has the capability to manually add any additional approvals deemed necessary for processing of the solicitation document. This is accomplished by the use of SDOC and PAPV screens.

**Inputs**

- Required solicitation number
- Required whim approval indicator
- Required manual approval data

**Outputs**

- Updated SDOC/PHLD/PAPV Table

**Completing The Procedure**

Cross-Reference Steps

1. Perform normal solicitation processing.

2. Add/Change Solicitation Header Table record approvals.

   a. Add SDOC, using procedures of 1.1 Add Solicitation Header Table above, solicitation header whim indicator = **P** or **R**.

   b. Change SDOC, using procedures of 1.2 Change Solicitation Header Table above, solicitation header whim indicator = **P** or **R**.

   c. Change SDOC, using procedures of 1.2 Change Solicitation Header Table above, solicitation status to greater than 324.

   NOTE: On successful change of status code, required solicitation stage 2 approvals will automatically be built in the PAPV (Approvals) Table.

3. Manually add solicitation approval record(s). See Section 13, Electronics Approval Processing, Chapter 2, 4 ADD/CHANGE MANUAL APPROVAL RECORDS.

# 6 PRINT/ISSUE SOLICITATIONS

## 6.1 Print Draft Solicitation

**Overview**

The AGPS user is provided the capability to print a draft solicitation for review purposes in AGPS. When a buyer has prepared the solicitation record in the desired manner, the next logical step is to print the solicitation in draft form for review. The draft solicitation may be printed by setting the status on the SDOC transaction to 345 for O/L or 350 for overnight. At this status code, AGPS will automatically create a bid list based upon the criteria on the solicitation record. The vendors are chosen based upon the commodity classes/sub-classes being purchased, the vendor selection and the geographic bid area codes. This is accomplished by the use of the SDOC screen.

**Inputs**

- Required solicitation number
- Required status code

**Outputs**

- Updated SDOC/SVEN Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Perform normal solicitation processing. Determine solicitation to be printed in draft. |
| | 2. Print draft solicitation in AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation vendor record should be displayed. |
| | 3. Type **CHANGE** in the Function Line. |
| | a. Using the TAB key, move to Status Code field and type **345 or 350**. |

Cross-Reference Steps

NOTE: Status code 345 will result in on-line print of the draft solicitation documents.

Status code 350 will result in over night print of the draft solicitation documents.

A draft bidder's list can only be generated during a nightly. Therefore, on-line print of a draft solicitation will not produce a draft bidder's list. If user wishes to review the bidder's list before printing a final solicitation, a draft solicitation should be done with status **350** in order to produce the draft bid list.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

## 6.2 Print/Issue And/Or Post Final Solicitation

**Overview**

The AGPS user is provided the capability to print and/or post a final solicitation for issue in AGPS. When the buyer has prepared the solicitation in draft and is ready to print and/or post the final solicitation, the final solicitation may be printed and/or posted by entering a bid opening date and time on the SDO3 transaction and by setting the status on the SDOC transaction to 355 for O/L or 360 for overnight. At this status code, AGPS will automatically create a bid list based upon the criteria on the solicitation record. The vendors are chosen based upon the commodity classes/sub-classes being purchased, the vendor selection codes and the geographic bid area codes. If the LaPAC Post field is "Y", the solicitation will also be posted to the LaPAC internet site. This is accomplished by the use of the SDOC screen.

**Inputs**

- Required solicitation number
- Required status code

**Outputs**

- Updated SDOC/SVEN Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Perform normal solicitation processing. Determine solicitation to be printed in final for mailing. |
| | 2. Print and/or post final solicitation in AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation vendor record should be displayed. |
| | 3. Type **CHANGE** in the Function Line. |
| | a. Using the TAB key, move to Status Code field and type **355** or **360**. |

Cross-Reference Steps

NOTE: Status code 355 will result in on-line print and/or post of the final solicitation documents.

Status code 360 will result in over night print and/or post of the final solicitation documents.

A bidder's list can only be generated during a nightly. Therefore, on-line print of a final solicitation will not produce a bidder's list, and therefore would only print a solicitation to add-on vendors. If user wishes to print the final solicitation on-line, a draft solicitation should be done with status **350** in order to produce the bid list, and then the status could be set to **355** to print the final solicitation on-line.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

Before the solicitation is printed draft or final, AGPS will automatically consecutively renumber the solicitation lines. If multiple requisitions are attached to the solicitation, AGPS numbers all lines consecutively beginning at 1, therefore the solicitation line numbers for the second and subsequent requisitions will differ from the requisition line numbers. From this point forward, all AGPS references will be to the solicitation line numbers and not the requisition line number. The awarded contract or order will reference the solicitation line number and the solicitation line number will be printed on the contract or order.

# 7 AMENDING SOLICITATIONS

When a solicitation needs to be changed, the buyer can prepare a change to the solicitation by creating a record in the solicitation amendment table (SAMD) and by adding text to the solicitation amendment text table (SATX). The buyer can change any aspect of the solicitation with the amendment including the bid opening date and time. A solicitation may be canceled in its entirety with an amendment. In some cases, the solicitation may need to be re-bid. For information on this process, see paragraph 8, Re-bid/Rework Solicitations below. When the amendment is printed in final, the revised bid opening date and time for the solicitation are updated automatically to reflect the new date and time.

Solicitation amendments may be printed in draft by setting the amendment status code to 350. Only one copy of the amendment is printed in draft. The buyer should review the draft amendment, make any corrections and reprint the draft if desired.

Solicitation amendments may be printed and/or posted in final form by setting the amendment status code to 360. A final amendment is printed for each active vendor on the solicitation bid list. If the original solicitation was posted, the amendment will automatically be posted to LaPAC.

Following are the details of the procedures to create a solicitation amendment, print draft amendment, obtain approvals and print and/or post final amendment.

## 7.1 Add Solicitation Amendment

**Overview**

The AGPS user is provided the capability to add a solicitation amendment header in the system for processing change to an issued solicitation. The first step in issuing a solicitation amendment is to add an amendment header record in the solicitation amendment table. This is accomplished by the use of the SAMD screen.

**Inputs**

- Required solicitation number
- Required amendment number
- Required amendment type
- Required label request type

**Outputs**

- Updated SAMD Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation to be amended. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| INST 4: BTAB | **Amendment Type Code** must be a valid entry in BTAB Table AM (Amendment Type). |
| | **Label Request Type** must be a valid entry in BTAB Table LR (Label Request Type). |
| | 2. Add SAMD record data into AGPS. |
| SDOC 4: SAMD | a. If the user is not in the SAMD screen, type **SAMD** in the Function Line and press RETURN/ENTER. |
| | b. Type **CLEAR** in the Function Line and press RETURN/ENTER. Screen data entry fields should be blanked and **ADD** inserted in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using the TAB key, move to Amendment Number field and type desired amendment number. |
| | e. Using the TAB key, move to Amendment Type Code field and type desired amendment type code. |
| | f. Using the TAB key, move to Label Request Type field and type desired label request type. |
| | 3. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |

## 7.2 Change Solicitation Amendment

**Overview**

The AGPS user is provided the capability to change/maintain a solicitation amendment header in the system for processing change to an issued solicitation. The user may revise the bid opening date and/or time, indicate mailing label requirements, etc. This is accomplished by the use of the SAMD screen.

**Inputs**

- Required solicitation number
- Required amendment number
- Required change to amendment type
- Required change to status code
- Required change to advertisement required
- Required change to date advertised
- Required change to revised bid open date
- Required change to revised bid open time
- Required change to label request type
- Required change to labels needed
- Required change to labels number up

**Outputs**

- Updated SAMD/SDOC Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine changes to solicitation amendment. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |

| Cross-Reference | Steps |
|---|---|
| INST 4: BTAB | **Amendment Type Code** must be a valid entry in BTAB Table AM (Amendment Type).<br><br>**Label Request Type** must be a valid entry in BTAB Table LR (Label Request Type). |
| SDOC 4: SAMD | **Amendment Number**, combined with solicitation number, must be key to a valid and active amendment record in the SAMD Table. |

2. Change SAMD record data in AGPS.

SDOC 4: SAMD

a. If the user is not in the SAMD screen, type **SAMD** in the Function Line and press RETURN/ENTER.

b. Type **INQUIRE** in the Function Line.

c. Using the TAB key, move to Solicitation Number field and type desired solicitation number.

d. Using the TAB key, move to Amendment Number field and type desired amendment number.

e. Press RETURN/ENTER. Requested amendment record should be displayed.

3. Type **CHANGE** in the Function Line.

a. Using the TAB key, move to Amendment Type Code field and type desired amendment type code.

b. Using the TAB key, move to Status Code field and type desired status code.

| If ... | Then ... |
|---|---|
| Identifying solicitation amendment for supervisor review | Type status code = 301 |
| Identifying solicitation amendment for buyer review | Type status code = 302 |
| Printing a draft solicitation amendment (O/N) | Type status code = 350 |

Cross-Reference Steps

| If ... | Then ... |
|---|---|
| Printing a solicitation amendment (O/L) | Type status code = 355 |
| Issuing a solicitation amendment (O/N) | Type status code = 360 |
| Canceling solicitation amendment | Type status code = 396-399 |

c. Using the TAB key, move to Advertisement Required field and type desired indicator. Allowable entries are **Y** and **N**.

d. Using the TAB key, move to Date Advertised field and type desired date. Required if Advertisement Required is **Y**.

e. Using the TAB key, move to Revised Bid Open Date field and type desired date. Date must be greater than existing solicitation scheduled or revised bid opening date.

NOTE: When solicitation amendment is processed to the vendor(s) the solicitation (SDO3) revised bid opening date will be updated with this date.

f. Using the TAB key, move to Revised Bid Open Time field and type desired time.

NOTE: When solicitation amendment is processed to the vendor(s) the solicitation (SDOC) revised bid opening time will be updated with this time.

g. Using the TAB key, move to Label Request Type field and type desired label request type.

h. Using the TAB key, move to Labels Needed (Y/N) field and type desired indicator. Allowable entries are **Y** and **N**. Defaults to "N" if left blank.

Cross-Reference Steps

i. Using the TAB key, move to the Labels Number Up field and type the desired number of labels to be printed. Depends on style of paper being used. If left blank, pulls from SDO2.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

## 7.3 Delete Solicitation Amendment

**Overview**

The AGPS user is provided the capability to delete a solicitation amendment header in the system that was inadvertently or incorrectly entered. The solicitation amendment must be 300. This is accomplished by the use of the SAMD screen.

**Inputs**

- Required solicitation number
- Required amendment number

**Outputs**

- Updated SAMD Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation amendment to be deleted. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| SDOC 4: SAMD | **Amendment Number**, combined with solicitation number, must be key to a valid and active amendment record in the SAMD Table. |
| | 2. Delete SAMD record data in AGPS. |
| SDOC 4: SAMD | a. If the user is not in the SAMD screen, type **SAMD** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using the TAB key, move to Amendment Number field and type desired amendment number. |
| | e. Press RETURN/ENTER. Requested amendment record should be displayed. |
| | 3. Type **DELETE** in the Function Line. |

| Cross-Reference | Steps |
|---|---|
| | 4. Press RETURN/ENTER.<br><br>NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |

## 7.4 Inquire Solicitation Amendment

**Overview**

The AGPS user is provided the capability to inquire a solicitation amendment header in AGPS. This is accomplished by the use of the SAMD screen.

**Inputs**

- Required solicitation number
- Required amendment number

**Outputs**

- Display of requested SAMD Table record

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation amendment to be inquired. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| SDOC 4: SAMD | **Amendment Number**, combined with solicitation number, must be key to a valid and active amendment record in the SAMD Table. |
| | 2. Inquire SAMD record data in AGPS. |
| SDOC 4: SAMD | a. If the user is not in the SAMD screen, type **SAMD** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using the TAB key, move to Amendment Number field and type desired amendment number. |
| | 3. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display requested solicitation amendment record. |

## 7.5 Add Solicitation Amendment Text Table

**Overview**

The AGPS user has the capability to add solicitation amendment text records for a solicitation amendment header in AGPS for print of the solicitation amendment. This text record may be used for processing general information/instructions relating to a specific solicitation amendment or legally binding text that will be printed on the amendment document. This is accomplished by the use of the SATX screen.

**Inputs**

- Required solicitation number
- Required solicitation amendment number
- Required text

**Outputs**

- Updated SATX Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine the solicitation amendment for which text will be added and the text to be entered. |
| | 2. Add SATX record into AGPS. |
| SDOC 4: SATX | a. If you are not in the SATX screen, type **SATX** in the Function Line and press RETURN/ENTER. |
| | b. Type **G (GET)** in the Function Line. |
| | c. Using TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using TAB key, move to Amendment Number field and type desired solicitation amendment number. |
| | 3. Press RETURN/ENTER. The text screen should be formatted with null (.) lines. If text is present, the text should be formatted to the screen. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display requested text record. |

Cross-Reference Steps

a. Type **C (CHANGE)** in the Function Line.

b. Using TAB key, move to the first text or null (.) line. Type the desired text. Text lines are seventy characters in length. A null (.) line cannot exist between text lines, (.) must be spaced out.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'ALL LINES CHANGED'.

# 7.6 Change Solicitation Amendment Text Table

**Overview**

The AGPS user is provided the capability to maintain solicitation amendment text for a valid solicitation amendment header record. This is accomplished by the use of the SATX screen.

**Inputs**

- Required solicitation number
- Required solicitation amendment number
- Required text action
- Required change to text

**Outputs**

- Updated SATX Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine the solicitation/amendment number for which the user will change amendment text and the required change to text. |
| | 2. Change SATX record in AGPS. |
| SDOC 4: SATX | a. If you are not in the SATX screen, type **SATX** in the Function Line and press RETURN/ENTER. |
| | b. Type **G (GET)** in the Function Line. |
| | c. Using TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using TAB key, move to Amendment Number field and type desired solicitation amendment number. |
| | e. Using TAB key, move to Text Action field and type desired text action. See Section 15, Miscellaneous Processing, General Text Processing, Chapter 2 for additional information. |
| | 3. Press RETURN/ENTER. The text screen should be formatted with null (.) lines. If text is present, the text should be formatted to the screen. |

Cross-Reference Steps

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display requested text record.

a. Type **C (CHANGE)** in the Function Line.

b. Using TAB key, move to the desired text or null (.) line. Type the desired text. Text lines are seventy characters in length. A null (.) line cannot exist between text lines, (.) must be spaced out.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'ALL LINES CHANGED'.

## 7.7 Delete/Insert Solicitation Amendment Text Table

**Overview**

The AGPS user is provided the capability to delete or insert lines of text for a valid solicitation amendment text record. This is accomplished by the use of the SATX screen.

**Inputs**

- Required solicitation number
- Required solicitation amendment number
- Required text action
- Required change to text

**Outputs**

- Update SATX Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine the solicitation/amendment number for which the user will delete/insert amendment text and the required change to text. |
| | 2. Delete/Insert text lines in SATX records. |
| SDOC 4: SATX | a. If you are not in the SATX screen, type **SATX** in the Function Line and press RETURN/ENTER. |
| | b. Type **G (GET)** in the Function Line. |
| | c. Using TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using TAB key, move to Amendment Number field and type desired solicitation amendment number. |
| | e. Using TAB key, move to Text Action field and type desired text action. See Section 15, Miscellaneous Processing, General Text Processing, Chapter 2 for additional information. |
| | 3. Press RETURN/ENTER. The text screen should be formatted with requested lines of text. |

Cross-Reference Steps

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display requested test record.

a. Type **C (CHANGE)** in the Function Line.

b. Using the TAB key, move to the Text Action field and type **X (to delete)**, OR **I (to insert)**.

c. Using the TAB key, move to the Line Number field and enter the text line(s) to be deleted (as a single line, i.e., 1, 2, etc., or a line range 1-4, or ALL (all lines)) **or**, if inserting text, insert the text line number after which text is to be inserted.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'PREVIOUS UPDATE SUCCESSFUL'.

**X** will result in the deletion of the text line numbers specified in the Line Number field. If the action was **X**, the text screen will return with all lines that were not deleted. If the action was "X ALL", skip to step 4.c. Before using the "X ALL" function, please be sure you do not need the text.

**I** indicates that the user desires to insert line(s) of text after the line of text identified in the Line Number field. If the action was **I**, the text screen will return with the line identified in the line number field followed by blank (null (.)) lines ready for text to be entered. Remember, the line number is the position of the line on the screen, and will be one or more of the numbers 1 through 9.

a. If inserting text, type **C (CHANGE)** in the function line.

b. Using the TAB key, move to the first null (.) line and type desired text. A null (.) line cannot exist between text lines, (.) must be spaced out. Skip to step 5.

c. If overwriting existing text, with "CHANGE" still in the Function Line, tab to the Line Number field and enter "UPLD". The UPLD process is required for text screens that pull a text description from a text data base (i.e. commodity data base CSPC or text data base TXLN). When using screens that access these text data bases (i.e. RMOD - OMOD - OCMD - KMOD - STXL) and the user needs to delete ALL text lines

| Cross-Reference | Steps |
|---|---|
| | and completely overwrite the existing description from a text data base, the UPLD (upload) process must be followed. Using the TAB key, move to the first null (.) line and type desired text. |
| | 5. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'PREVIOUS UPDATE SUCCESSFUL'. |

## 7.8 Inquire Solicitation Amendment Text Table

**Overview**

The AGPS user is provided the capability to inquire text for a solicitation amendment text record. This is accomplished by the use of the SATX screen.

**Inputs**

- Required solicitation number
- Required solicitation amendment number
- Required text action

**Outputs**

- Display of requested SATX Table text

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine the solicitation/amendment number for which the user will inquire text. |
| | 2. Inquire SATX record text. |
| SDOC 4: SATX | a. If you are not in the SATX screen, type **SATX** in the Function Line and press RETURN/ENTER. |
| | b. Type **G (GET)** in the Function Line. |
| | c. Using TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using TAB key, move to Amendment Number field and type desired solicitation amendment number. |
| | e. Using TAB key, move to Text Action field and type desired text action. See Section 15, Miscellaneous Processing, General Text Processing, Chapter 2 for additional information. |
| | 3. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, the text line record should be displayed. |

## 7.9 Solicitation Amendment Approval Processing

**Overview**

The AGPS user is provided the capability to add/change and/or approve solicitation amendment approval records. The system is designed to automatically create all required solicitation amendment approvals when an add and/or change is processed for the solicitation amendment header. The user also has the capability to manually add any additional approvals deemed necessary for processing of the solicitation amendment document. This is accomplished by the use of the SAMD and PAPV screens.

**Inputs**

- Required solicitation number
- Required solicitation amendment number
- Required whim approval indicator
- Required manual approval data

**Outputs**

- Updated SAMD/PHLD/PAPV Table

**Completing The Procedure**

Cross-Reference Steps

1. Perform normal solicitation amendment processing.

2. Add/Change Solicitation Amendment Header Table record approvals.

   a. Add SAMD, using procedures of 7.1 Add Solicitation Amendment above, solicitation amendment header whim indicator = **P** or **R**.

   b. Change SAMD, using procedures of 7.2 Change Solicitation Amendment above, solicitation amendment header whim indicator = **P** or **R**.

   c. Change SAMD, using procedures of 7.2 Change Solicitation Amendment above, solicitation amendment status to greater than 324.

   NOTE: On successful change of status code, required solicitation stage 3 approvals will automatically be built in the PAPV (Approvals) Table.

3. Manually add solicitation amendment approval record(s). See Section 13, Electronics Approval Processing, Chapter 2, 4 ADD/CHANGE MANUAL APPROVAL RECORDS.

# 7.10 Print/Issue And/Or Post Solicitation Amendment

**Overview**

The AGPS user is provided the capability to print a draft solicitation amendment for review purposes in AGPS. When a buyer has prepared the solicitation amendment record in the desired manner, the next logical step is to print the solicitation amendment in draft form for review. The draft solicitation amendment may be printed by setting the status on the SAMD transaction to 350 for overnight. When the buyer has prepared the solicitation amendment in draft and is ready to print the final solicitation amendment, the final solicitation amendment may be printed by setting the status on the SAMD transaction to 355 for on-line or 360 for overnight. If the LaPAC Post field is Y, the solicitation amendment will also be posted to the LaPAC internet site.

**Inputs**

- Required solicitation number
- Required solicitation amendment number

**Outputs**

- Updated SAMD Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Perform normal solicitation amendment processing. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| SDOC 4: SAMD | **Amendment Number**, combined with solicitation number, must be key to a valid and active amendment record in the SAMD Table. |
| | 2. Print and/or post solicitation amendment in AGPS. |
| SDOC 4: SAMD | a. If the user is not in the SAMD screen, type **SAMD** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using the TAB key, move to Amendment Number field and type desired amendment number. |

Cross-Reference Steps

e. Press RETURN/ENTER. Requested amendment record should be displayed.

3. Type **CHANGE** in the Function Line.

a. Using the TAB key, move to Status Code field and type **345/350 or 355/360**.

NOTE: Status code 345 will result in on-line print of the draft solicitation amendment documents.

Status code 350 will result in overnight print of the draft solicitation amendment documents.

Status code 355 will result in on-line print and/or post of the solicitation amendment documents.

Status code 360 will result in overnight print and/or post of the solicitation amendment documents.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

All active vendors on the bid list for the basic solicitation will receive a copy of the solicitation amendment if SAMD Label Request Type is **A** (All). After the final solicitation is issued, any vendors who casually pick up or request a copy of the solicitation will be added to the bid list. These vendors will automatically receive a copy of all amendments.

# 8 RE-WORK/RE-BID SOLICITATIONS

## 8.1 Re-Work Before Bids Are Opened

**Overview**

The AGPS user is provided the capability to re-work a solicitation before bids are opened (solicitation issued) in AGPS. If a solicitation has been printed in draft, reviewed and the buyer determines that the requisition/solicitation needs to be reworked, the buyer must set the solicitation status code to 305 - Re-bid/Rework Solicitation. If changes to the requisition are necessary, un-attach the requisition by deleting the SRQN, then rework the requisition by returning it back to the user for re-work. This is accomplished by the use of the SDOC and SRQN screens.

**Inputs**

- Required solicitation number

**Outputs**

- Updated SDOC and/or SRQN Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation to be re-worked. Determine whether the same solicitation number will be used, or whether the solicitation should be cancelled. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| | 2. Re-Work solicitation in AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |
| | 3. Type **CHANGE** in the Function Line |
| | a. Using the TAB key, move to Status Code field and type **305**.. |

| Cross-Reference | Steps |
|---|---|

4. Press RETURN/ENTER.

   NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

NOTE: This essentially returns the solicitation to the point before you began processing it.

If the requisition has to be re-worked, using the procedures of 2.2 Delete Solicitation Requisition Number, un-attach the requisition from the solicitation. The requisition can then be returned for re-work following the procedures in Section 6, Requisition Processing. When the requisition is ready to be bid, it can be re-attached to the same solicitation.

If the solicitation number is not going to be reused, set the status code on the solicitation to **396** (cancelled). When the requisition is ready to be bid, it can be attached to a new solicitation.

## 8.2 Re-Bid After Bids Have Been Issued/Opened

**Overview**

The AGPS user is provided the capability to re-bid a solicitation after bids are opened (solicitation issued) in AGPS. This should be done only after careful consideration of compromising the competitive bidding process. The buyer may use the same solicitation number, or un-attach the requisition and attach it to a new solicitation number. In any case, when the re-bid is set in motion, processed solicitation approvals are automatically re-instated for the solicitation. This is accomplished by the use of the SDOC and SRQN screens.

**Inputs**

- Required solicitation number

**Outputs**

- Updated SDOC and/or RVEN Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation to be re-bid. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| | 2. Rebid solicitation in AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |
| | 3. Type **CHANGE** in the Function Line. |
| | a. Using the TAB key, move to Status Code field and type **305**. |
| | 4. Press RETURN/ENTER. |

Cross-Reference Steps

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

NOTE: This action would delete all previously recorded RVEN records for solicitation line(s) with award flag equal **N**. RVEN records with an award flag equal **Y** will be maintained in the system. Then, if the requisition has to be re-worked, using the procedures of 2.2 Delete Solicitation Requisition Number, un-attach the requisition from the solicitation. The requisition can then be returned for re-work following the procedures in Section 6, Requisition Processing. When the requisition is ready to be re-bid, it can be re-attached to the same solicitation.

If it is necessary to maintain all previously recorded RVEN records, the procedure would be to cancel the solicitation by changing the status to **396**. Once the solicitation is canceled, neither the solicitation or the requisition attached can be reused.

If a partial award has been made, follow the procedures of 11.3 Partial Award/Re-Bid of a Solicitation.

# 9 RECORDING/MAINTAINING BIDS

## 9.1 Prepare Solicitation To Record Bids

**Overview**

The AGPS user is provided the capability to prepare a solicitation for the recording of bids in AGPS. This is accomplished by the use of the SDOC screen.

**Inputs**

- Required solicitation number

**Outputs**

- Updated SDOC Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation to have bids recorded. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| | 2. Change SDOC status to record bids in AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |
| | 3. Type **CHANGE** in the Function Line. |
| | a. Using the TAB key, move to Status Code field and type **365**. |
| | 4. Press RETURN/ENTER. |

| Cross-Reference | Steps |
|---|---|
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |

# 9.2 Record Vendor Level Bid Data

**Overview**

The AGPS user is provided the capability to record vendor level bid data for an opened solicitation in AGPS. Vendor level information would include such data as delivery terms, discount terms, FOB point, point of contact, bond data, etc. This is accomplished by the use of the SVE2 and SVE3 screens.

**Inputs**

- Required solicitation number
- Required vendor number and bid data

**Outputs**

- Updated SVEN Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation ready for recording bids and vendor data available. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| SDOC 4: SVEN | **Vendor Number**, combined with the solicitation number, must be key to a valid and active solicitation vendor record in the SVEN Table. |
| INST 4: BTAB | **Bid Bond Code** must be a valid entry in BTAB Table BC (Bond Code). |
| | **Bid Bond Type** must be a valid entry in BTAB Table BN (Bond Type Code). |
| | 2. Enter vendor level bid data in AGPS. |
| SDOC 4: SVE2 | a. If the user is not in the SVE2 screen, type **SVE2** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using the TAB key, move to Vendor Number field and type desired vendor number. |

Cross-Reference Steps

e. Press RETURN/ENTER. Requested solicitation vendor record should be displayed.

3. Type **CHANGE** in the Function Line.

a. Using the TAB key, move to Master Return Code field and type desired master bid return code. See explanation of bid return codes in Function Overview above.

b. Using the TAB key, move to Bid FOB Point field and type desired FOB point.

c. Using the TAB key, move to Discount Terms field and type desired discount terms.

d. Using the TAB key, move to Discount Percent field and type desired prompt payment discount percent.

e. Using the TAB key, move to Disc Period field and type desired prompt payment discount period.

f. Using the TAB key, move to Net Period field and type desired prompt payment net period.

g. Using the TAB key, move to Delivery Terms field and type desired delivery terms.

h. Using the TAB key, move to Delivery Days ARO field and type desired delivery days after receipt of order.

i. Using the TAB key, move to Weeks ARO field and type desired delivery weeks after receipt of order.

j. Using the TAB key, move to Alt Del Sched field and type desired indicator. Allowed entries are **Y** or **N**.

k. Using the TAB key, move to Begin Order Period field and type desired ordering period begin date. This should be entered if award will result in contract award. Date is used for the contract begin ordering date.

l. Using the TAB key, move to End Order Period field and type desired ordering period end date. This should be entered if award will result in contract award. Date is used for the contract end ordering date.

m. Using the TAB key, move to Minimum Order Amount field and type desired minimum order amount required by the vendor.

| Cross-Reference | Steps |
|---|---|

n. Using the TAB key, move to Bid Reference No field and type desired vendor bid reference number if different from the solicitation number.

o. Using the TAB key, move to Bid Firm Days field and type desired number of days vendor will honor the bid from date of bid opening.

p. Using the TAB key, move to Bid Firm Date field and type desired date till which vendor will honor the bid from date of bid opening. If bid firm days is greater than spaces, this entry must be blank.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

5. Enter vendor bid bond data in AGPS.

NOTE: If a bid bond was required, user must record receipt of the bond.

SDOC 4: SVE3

a. If the user is not in the SVE3 screen, type **SVE3** in the Function Line and press RETURN/ENTER.

b. Type **INQUIRE** in the Function Line.

c. Using the TAB key, move to Solicitation Number field and type desired solicitation number.

d. Using the TAB key, move to Vendor Number field and type desired vendor number.

e. Press RETURN/ENTER. Requested solicitation vendor record should be displayed.

6. Type **CHANGE** in the Function Line.

a. Using the TAB key, move to Bid Bond Code field and type desired bid bond code.

b. Using the TAB key, move to Bid Bond Type field and type desired bid bond type.

c. Using the TAB key, move to Bond Co/Bank field and type desired bonding company or bank name.

Cross-Reference Steps

d. Using the TAB key, move to Bid Bond Amount field and type desired bid bond amount.

e. Using the TAB key, move to Bond/Check No field and type desired bond or check number submitted for the bid bond.

f. Using the TAB key, move to Bid Bond Expiration field and type desired bid bond expiration date.

g. Using the TAB key, move to Conference Attend field corresponding to the conference sequence number as listed in SDO4 and type attendance indicator for conferences attended by the vendor. Allowable entry is **Y** or **N**.

h. Using the TAB key, move to Certificate Recvd field corresponding to the certificate sequence number as listed in SDO5 and type receipt indicator for certificates received from the vendor. Allowable entry is **Y** or **N**.

7. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

## 9.3 Add Solicitation Vendor Text Table

**Overview**

The AGPS user has the capability to add solicitation vendor text records for a solicitation vendor header in AGPS for print of bid tabulation and award. Solicitation vendor text is information provided by the vendor that should appear on the bid tabulation and on the contract. An example of the use of such text would be to reflect an exception to a term and condition. This is accomplished by the use of the SVTX screen.

**Inputs**

- Required solicitation number
- Required solicitation vendor number
- Required text

**Outputs**

- Updated SVTX Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine the solicitation vendor for which text will be added and the text to be entered. |
| | 2. Add SVTX record into AGPS. |
| SDOC 4: SVTX | a. If you are not in the SVTX screen, type **SVTX** in the Function Line and press RETURN/ENTER. |
| | b. Type **G (GET)** in the Function Line. |
| | c. Using TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using TAB key, move to Vendor Number field and type desired solicitation vendor number. |
| | 3. Press RETURN/ENTER. The text screen should be formatted with null (.) lines. If text is present, the text should be formatted to the screen. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display requested text record. |

Cross-Reference Steps

a. Type **C (CHANGE)** in the Function Line.

b. Using TAB key, move to the first text or null (.) line. Type the desired text. Text lines are seventy characters in length. A null (.) line cannot exist between text lines, (.) must be spaced out.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'ALL LINES CHANGED'.

# 9.4 Change Solicitation Vendor Text Table

**Overview**

The AGPS user is provided the capability to maintain solicitation vendor text for a valid solicitation vendor header record. This is accomplished by the use of the SVTX screen.

**Inputs**

- Required solicitation number
- Required solicitation vendor number
- Required text action
- Required change to text

**Outputs**

- Updated SVTX Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine the solicitation/vendor number for which the user will change vendor text and the required change to text. |
| | 2. Change SVTX record in AGPS. |
| SDOC 4: SVTX | a. If you are not in the SVTX screen, type **SVTX** in the Function Line and press RETURN/ENTER. |
| | b. Type **G (GET)** in the Function Line. |
| | c. Using TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using TAB key, move to Vendor Number field and type desired solicitation vendor number. |
| | e. Using TAB key, move to Text Action field and type desired text action. See Section 15, Miscellaneous Processing, General Text Processing, Chapter 2 for additional information. |
| | 3. Press RETURN/ENTER. The text screen should be formatted with null (.) lines. If text is present, the text should be formatted to the screen. |

Cross-Reference Steps

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display requested text record.

a. Type **C (CHANGE)** in the Function Line.

b. Using TAB key, move to the desired text or null (.) line. Type the desired text. Text lines are seventy characters in length. A null (.) line cannot exist between text lines, (.) must be spaced out.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'ALL LINES CHANGED'.

## 9.5 Delete/Insert Solicitation Vendor Text Table

**Overview**

The AGPS user is provided the capability to delete or insert lines of text for a valid solicitation vendor text record. This is accomplished by the use of the SVTX screen.

**Inputs**

- Required solicitation number
- Required solicitation vendor number
- Required text action
- Required change to text

**Outputs**

- Update SVTX Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine the solicitation/vendor number for which the user will delete/insert vendor text and the required change to text. |
| | 2. Delete/Insert text lines in SVTX records. |
| SDOC 4: SVTX | a. If you are not in the SVTX screen, type **SVTX** in the Function Line and press RETURN/ENTER. |
| | b. Type **G (GET)** in the Function Line. |
| | c. Using TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using TAB key, move to Vendor Number field and type desired solicitation vendor number. |
| | e. Using TAB key, move to Text Action field and type desired text action. See Section 15, Miscellaneous Processing, General Text Processing, Chapter 2 for additional information. |
| | 3. Press RETURN/ENTER. The text screen should be formatted with requested lines of text. |

Cross-Reference Steps

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display requested test record.

a. Type **C (CHANGE)** in the Function Line.

b. Using the TAB key, move to the Text Action field and type **X (to delete)**, OR **I (to insert)**.

c. Using the TAB key, move to the Line Number field and enter the text line(s) to be deleted (as a single line, i.e., 1, 2, etc., or a line range 1-4, or ALL (all lines)) **or**, if inserting text, insert the text line number after which text is to be inserted.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'PREVIOUS UPDATE SUCCESSFUL'.

**X** will result in the deletion of the text line numbers specified in the Line Number field. If the action was **X**, the text screen will return with all lines that were not deleted. If the action was "X ALL", skip to step 4.c. Before using the "X ALL" function, please be sure you do not need the text.

**I** indicates that the user desires to insert line(s) of text after the line of text identified in the Line Number field. If the action was **I**, the text screen will return with the line identified in the line number field followed by blank (null (.)) lines ready for text to be entered. Remember, the line number is the position of the line on the screen, and will be one or more of the numbers 1 through 9.

a. If inserting text, type **C (CHANGE)** in the function line.

b. Using the TAB key, move to the first null (.) line and type desired text. A null (.) line cannot exist between text lines, (.) must be spaced out. Skip to step 5.

c. If overwriting existing text, with "CHANGE" still in the Function Line, tab to the Line Number field and enter "UPLD". The UPLD process is required for text screens that pull a text description from a text data base (i.e. commodity data base CSPC or text data base TXLN). When using screens that access these text data bases (i.e. RMOD - OMOD - OCMD - KMOD - STXL) and the user needs to delete ALL text lines

| Cross-Reference | Steps |
|---|---|
| | and completely overwrite the existing description from a text data base, the UPLD (upload) process must be followed. Using the TAB key, move to the first null (.) line and type desired text. |
| | 5. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'PREVIOUS UPDATE SUCCESSFUL'. |

# 9.6 Inquire Solicitation Vendor Text Table

**Overview**

The AGPS user is provided the capability to inquire text for a solicitation vendor text record. This is accomplished by the use of the SVTX screen.

**Inputs**

- Required solicitation number
- Required solicitation vendor number
- Required text action

**Outputs**

- Display of requested SVTX Table text

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine the solicitation/vendor number for which the user will inquire text. |
| | 2. Inquire SVTX record text. |
| SDOC 4: SVTX | a. If you are not in the SVTX screen, type **SVTX** in the Function Line and press RETURN/ENTER. |
| | b. Type **G (GET)** in the Function Line. |
| | c. Using TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using TAB key, move to Vendor Number field and type desired solicitation vendor number. |
| | e. Using TAB key, move to Text Action field and type desired text action. See Section 15, Miscellaneous Processing, General Text Processing, Chapter 2 for additional information. |
| | 3. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, the text line record should be displayed. |

# 9.7 Add Line Level Bid Data

**Overview**

The AGPS user is provided the capability to record line level bid data for an opened solicitation in AGPS. Line level information would include such data as bid quantity, bid unit price, bid unit of measure, etc. This is accomplished by the use of the RVE2 or RBID (Record Multiple Bids) screens.

**Inputs**

- Required solicitation number
- Required vendor number and bid data
- Required solicitation line number

Outputs

- Updated RVEN Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation/line ready for recording bids and vendor line bid data. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| SDOC 4: SVEN | **Vendor Number**, combined with the solicitation number, must be key to a valid and active solicitation vendor record in the SVEN Table. |
| INST 4: BTAB | **Bid Return Code** must be a valid entry in BTAB Table MR (Master Bid Return Code). |
| | 2. Enter line level bid data in AGPS. |
| SDOC 4: RVE2 | a. If the user is not in the RVE2 screen, type **RVE2** in the Function Line and press RETURN/ENTER. |
| | b. Type **CLEAR** in the Function Line and press RETURN/ENTER. Screen data entry fields should be blanked and **ADD** inserted in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |

Cross-Reference Steps

d. Using the TAB key, move to Line Number field and type desired solicitation line number.

e. Using the TAB key, move to Alt Bid Code field and type desired alternate bid indicator. Must be **00** if not an alternate bid.

f. Using the TAB key, move to Vendor Number field and type desired vendor number.

g. Using the TAB key, move to Bid Return Code field and type desired bid return code for the solicitation line. Cannot be **01** if alternate bid code is other than **00**. See discussion of bid return codes in Function Overview.

h. Using the TAB key, move to Bid Quantity From field and type the from bid quantity of the vendor's bid.

i. Using the TAB key, move to Bid Quantity To field and type the to bid quantity of the vendor's bid. This normally will be used on contract awards.

j. Using the TAB key, move to Bid Unit of Measure field and type the unit of measure of the vendor's bid.

k. Using the TAB key, move to Bid Unit Price field and type the unit price of the vendor's bid. Must be blank if discount off catalog is greater than 0.

l. Using the TAB key, move to Extended Amount field and type the extended amount of the vendor's bid. Must be blank if discount off catalog is greater than 0.

m. Using the TAB key, move to Disc Off Catalog field and type the discount off catalog of the vendor's bid. Must be blank if unit price is greater than 0.

3. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

| Cross-Reference | Steps |
|---|---|

4. Enter multiple line level bid data in AGPS.

SDOC 4: RBID

a. If the user is not in the RBID screen, type **RBID** in the Function Line and press RETURN/ENTER.

b. Type **CLEAR** in the Function Line and press RETURN/ENTER. Screen data entry fields should be blanked and **ADD** inserted in the Function Line.

c. Using the TAB key, move to Vendor Number field and type desired vendor number.

d. Using the TAB key, move to Solicitation Number field and type desired solicitation number.

e. Using the TAB key, move to Alt Bid Code field and type desired alternate bid indicator. Must be **00** if not an alternate bid.

f. Using the TAB key, move to first available Line Number field and type desired solicitation line number.

g. Using the TAB key, move to corresponding BRC field and type desired bid return code for the solicitation line. Cannot be **01** if alternate bid code is other than **00**. See discussion of bid return codes in Function Overview above.

h. Using the TAB key, move to corresponding From Qty field and type the from bid quantity of the vendor's bid.

i. Using the TAB key, move to corresponding To Qty field and type the to bid quantity of the vendor's bid. This normally will be used on contract awards.

j. Using the TAB key, move to corresponding Unit field and type the unit of measure of the vendor's bid.

k. Using the TAB key, move to corresponding Unit Price field and type the unit price of the vendor's bid. Must be blank if discount off catalog is greater than 0.

l. Using the TAB key, move to corresponding Ext Amount field and type the extended amount of the vendor's bid. Must be blank if discount off catalog is greater than 0.

| Cross-Reference | Steps |
|---|---|

m. Using the TAB key, move to corresponding % Off Cat field and type the discount off catalog of the vendor's bid. Must be blank if unit price is greater than 0.

5. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

# 9.8 Change Line Level Bid Data

**Overview**

The AGPS user is provided the capability to maintain line level bid data for an opened solicitation in AGPS. Line level information may change due to a vendor revising his bid, etc. This is accomplished by the use of the RVE2 or RBID screens.

**Inputs**

- Required solicitation number
- Required vendor number and change to bid data
- Required solicitation line number

Outputs

- Updated RVEN Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation/line ready for recording bids and vendor line bid data. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| SDOC 4: SVEN | **Vendor Number**, combined with the solicitation number, must be key to a valid and active solicitation vendor record in the SVEN Table. |
| INST 4: BTAB | **Bid Return Code** must be a valid entry in BTAB Table MR (Master Bid Return Code). |
| | 2. Change line level bid data in AGPS. |
| SDOC 4: RVE2 | a. If the user is not in the RVE2 screen, type **RVE2** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using the TAB key, move to Line Number field and type desired solicitation line number. |

Cross-Reference Steps

e. Using the TAB key, move to Alt Bid Code field and type desired alternate bid indicator. Must be **00** if not an alternate bid.

f. Using the TAB key, move to Vendor Number field and type desired vendor number.

g. Press RETURN/ENTER. Requested requisition line bid record should be displayed.

3. Type **CHANGE** in the Function Line.

a. Using the TAB key, move to Vendor Preference field and type desired vendor preference percent claimed for this item (i.e. enter 7 for 7% claimed).

b. Using the TAB key, move to Bid Return Code field and type desired bid return code for the solicitation line. Cannot be **01** if alternate bid code is other than **00**. See discussion of bid return codes in Function Overview.

c. Using the TAB key, move to Bid Quantity From field and type the from bid quantity of the vendor's bid.

d. Using the TAB key, move to Bid Quantity To field and type the to bid quantity of the vendor's bid. This normally will be used on contract awards.

e. Using the TAB key, move to Bid Unit of Measure field and type the unit of measure of the vendor's bid.

f. Using the TAB key, move to Bid Unit Price field and type the unit price of the vendor's bid. Must be blank if discount off catalog is greater than 0.

g. Using the TAB key, move to Extended Amount field and type the extended amount of the vendor's bid. Must be blank if discount off catalog is greater than 0.

h. Using the TAB key, move to Disc Off Catalog field and type the discount off catalog of the vendor's bid. Must be blank if unit price is greater than 0.

i. Using the TAB key, move to Sample Recvd field and type desired indicator. Allowable entries are **Y** or **N**.

| Cross-Reference | Steps |
|---|---|

j. Using the TAB key, move to Disc Lit Rcvd field and type desired indicator. Allowable entries are **Y** or **N**.

k. Using the TAB key, move to Brand Name field and type the brand name from the vendor's bid.

l. Using the TAB key, move to Model Number field and type the model number from the vendor's bid.

m. Using the TAB key, move to Delivery Days ARO field and type the delivery days after receipt of order for the line if different than that recorded previously for the vendor in SVEN. Must be blank if weeks aro is greater than spaces.

n. Using the TAB key, move to Weeks ARO field and type the delivery weeks after receipt of order for the line if different than that recorded previously for the vendor in SVEN. Must be blank if days aro is greater than spaces.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

5. Change multiple line level bid data in AGPS.

SDOC 4: RBID

a. If the user is not in the RBID screen, type **RBID** in the Function Line and press RETURN/ENTER.

b. Type **INQUIRE** in the Function Line.

c. Using the TAB key, move to Vendor Number field and type desired vendor number.

d. Using the TAB key, move to Solicitation Number field and type desired solicitation number.

e. Using the TAB key, move to Alt Bid Code field and type desired alternate bid indicator. Must be **00** if not an alternate bid.

f. Using the TAB key, move to first Line Number field and type desired solicitation line number.

Cross-Reference Steps

g. Press RETURN/ENTER. Requested requisition line bid record should be displayed.

6. Type **CHANGE** in the Function Line.

a. Using the TAB key, move to BRC (Bid Return Code) field and type desired bid return code for the solicitation line. Cannot be **01** if alternate bid code is other than **00**. See discussion of bid return codes in Function Overview.

b. Using the TAB key, move to From Qty field and type the from bid quantity of the vendor's bid.

c. Using the TAB key, move to Qty To field and type the to bid quantity of the vendor's bid. This normally will be used on contract awards.

d. Using the TAB key, move to Unit field and type the unit of measure of the vendor's bid.

e. Using the TAB key, move to Unit Price field and type the unit price of the vendor's bid. Must be blank if discount off catalog is greater than 0.

f. Using the TAB key, move to Ext Amount field and type the extended amount of the vendor's bid. Must be blank if discount off catalog is greater than 0.

g. Using the TAB key, move to % Off Cat field and type the discount off catalog of the vendor's bid. Must be blank if unit price is greater than 0.

h. Using the TAB key, move to Brand field and type the brand name from the vendor's bid.

i. Using the TAB key, move to Model field and type the model number from the vendor's bid.

j. Using the TAB key, move to Sample field and type desired indicator. Allowable entries are **Y** or **N**.

k. Using the TAB key, move to Lit field and type desired indicator. Allowable entries are **Y** or **N**.

l. Using the TAB key, move to Text Line field and type desired vendor text. This text will be used to create an RVTX text record for this line.

| Cross-Reference | Steps |
|---|---|
| | m. Using the TAB key, move to Vend Pref field and type desired vendor preference percent claimed for this item (i.e. enter 7 for 7% claimed). |
| | 7. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |

# 9.9 Delete Line Level Bid Data

**Overview**

The AGPS user is provided the capability to delete line level bid data for an opened solicitation in AGPS. When a solicitation is re-bid, it is necessary to delete existing vendor line bid data. This is accomplished by the use of the SDOC screen.

**Inputs**

- Required solicitation number

**Outputs**

- Updated SDOC/RVEN Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation/line data to be deleted. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| | 2. Delete line level bid data (RVEN) in AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |
| | 3. Type **CHANGE** in the Function Line. |
| | a. Using the TAB key, move to Status Code field and type **305**. |
| | 4. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |

| Cross-Reference | Steps |
| --- | --- |
| | All previously recorded RVEN records should be deleted for that solicitation. |

# 9.10 Inquire Line Level Bid Data

**Overview**

The AGPS user is provided the capability to inquire line level bid data for an opened solicitation in AGPS. Line level information may change due to a vendor revising his bid, etc. This is accomplished by the use of the RVE2 or RBID screens.

**Inputs**

- Required solicitation number
- Required vendor number and change to bid data
- Required solicitation line number

Outputs

- Display of requested RVEN Table record(s)

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation/line to inquired. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| SDOC 4: SVEN | **Vendor Number**, combined with the solicitation number, must be key to a valid and active solicitation vendor record in the SVEN Table. |
| | 2. Inquire line level bid data in AGPS. |
| SDOC 4: RVE2 | a. If the user is not in the RVE2 screen, type **RVE2** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using the TAB key, move to Line Number field and type desired solicitation line number. |
| | e. Using the TAB key, move to Alt Bid Code field and type desired alternate bid indicator. Must be **00** if not an alternate bid. |

| Cross-Reference | Steps |
|---|---|

f. Using the TAB key, move to Vendor Number field and type desired vendor number.

3. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display requested record.

4. Inquire multiple line level bid data in AGPS.

SDOC 4: RBID

a. If the user is not in the RBID screen, type **RBID** in the Function Line and press RETURN/ENTER.

b. Type **INQUIRE** in the Function Line.

c. Using the TAB key, move to Vendor Number field and type desired vendor number.

d. Using the TAB key, move to Solicitation Number field and type desired solicitation number.

e. Using the TAB key, move to Alt Bid Code field and type desired alternate bid indicator. Must be **00** if not an alternate bid.

f. Using the TAB key, move to first Line Number field and type desired solicitation line number.

5. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display requested record.

# 9.11 Add Requisition Vendor Text Table

**Overview**

The AGPS user has the capability to add requisition vendor text records for a bidding vendor line record in AGPS for print of the bid tabulation or award. This text record may be used for processing vendor information with respect to a specific solicitation line and alternate bid. Such text could be an exception to a term and condition. This is accomplished by the use of the RVTX screen.

**Inputs**

- Required solicitation number
- Required solicitation line number
- Required alternate bid code
- Required text

**Outputs**

- Updated RVTX Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine the solicitation line for which text will be added and the text to be entered. |
| | 2. Add RVTX record into AGPS. |
| SDOC 4: RVTX | a. If you are not in the RVTX screen, type **RVTX** in the Function Line and press RETURN/ENTER. |
| | b. Type **G (GET)** in the Function Line. |
| | c. Using TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using TAB key, move to Solicitation Line field and type desired solicitation line number. |
| | e. Using TAB key, move to Alternate Bid Code field and type desired alternate bid code. |
| | 3. Press RETURN/ENTER. The text screen should be formatted with null (.) lines. If text is present, the text should be formatted to the screen. |

Cross-Reference Steps

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display requested text record.

a. Type **C (CHANGE)** in the Function Line.

b. Using TAB key, move to the first text or null (.) line. Type the desired text. Text lines are forty characters in length. A null (.) line cannot exist between text lines, (.) must be spaced out.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'ALL LINES CHANGED'.

# 9.12 Change Requisition Vendor Text Table

**Overview**

The AGPS user is provided the capability to maintain requisition vendor text for a valid bidding vendor line record. This is accomplished by the use of the RVTX screen.

**Inputs**

- Required solicitation number
- Required solicitation line number
- Required alternate bid code
- Required text action
- Required change to text

**Outputs**

- Updated RVTX Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine the bidding vendor line record for which the user will change text and the required change to text. |
| | 2. Change RVTX record in AGPS. |
| SDOC 4: RVTX | a. If you are not in the RVTX screen, type **RVTX** in the Function Line and press RETURN/ENTER. |
| | b. Type **G (GET)** in the Function Line. |
| | c. Using TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using TAB key, move to Solicitation Line field and type desired solicitation line number. |
| | e. Using TAB key, move to Alternate Bid Code field and type desired alternate bid code. |
| | f. Using TAB key, move to Text Action field and type desired text action. See Section 15, Miscellaneous Processing, General Text Processing, Chapter 2 for additional information. |

Cross-Reference Steps

3. Press RETURN/ENTER. The text screen should be formatted with null (.) lines. If text is present, the text should be formatted to the screen.

   NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display requested text record.

   a. Type **C (CHANGE)** in the Function Line.

   b. Using TAB key, move to the desired text or null (.) line. Type the desired text. Text lines are forty characters in length. A null (.) line cannot exist between text lines, (.) must be spaced out.

4. Press RETURN/ENTER.

   NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'ALL LINES CHANGED'.

# 9.13 Delete/Insert Requisition Vendor Text Table

**Overview**

The AGPS user is provided the capability to delete or insert lines of text for a valid requisition vendor text record. This is accomplished by the use of the RVTX screen.

**Inputs**

- Required solicitation number
- Required solicitation line number
- Required alternate bid code
- Required text action
- Required change to text

**Outputs**

- Update RVTX Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine the requisition vendor text record for which the user will delete/insert text and the required change to text. |
| | 2. Delete/Insert text lines in RVTX records. |
| SDOC 4: RVTX | a. If you are not in the RVTX screen, type **RVTX** in the Function Line and press RETURN/ENTER. |
| | b. Type **G (GET)** in the Function Line. |
| | c. Using TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using TAB key, move to Solicitation Line field and type desired solicitation line number. |
| | e. Using TAB key, move to Alternate Bid Code field and type desired alternate bid code. |

Cross-Reference Steps

f. Using TAB key, move to Text Action field and type desired text action. See Section 15, Miscellaneous Processing, General Text Processing, Chapter 2 for additional information.

3. Press RETURN/ENTER. The text screen should be formatted with requested lines of text.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display requested test record.

a. Type **C (CHANGE)** in the Function Line.

b. Using the TAB key, move to the Text Action field and type **X (to delete)**, OR **I (to insert)**.

c. Using the TAB key, move to the Line Number field and enter the text line(s) to be deleted (as a single line, i.e., 1, 2, etc., or a line range 1-4, or ALL (all lines)) **or**, if inserting text, insert the text line number after which text is to be inserted.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'PREVIOUS UPDATE SUCCESSFUL'.

**X** will result in the deletion of the text line numbers specified in the Line Number field. If the action was **X**, the text screen will return with all lines that were not deleted. If the action was "X ALL", skip to step 4.c. Before using the "X ALL" function, please be sure you do not need the text.

**I** indicates that the user desires to insert line(s) of text after the line of text identified in the Line Number field. If the action was **I**, the text screen will return with the line identified in the line number field followed by blank (null (.)) lines ready for text to be entered. Remember, the line number is the position of the line on the screen, and will be one or more of the numbers 1 through 9.

a. If inserting text, type **C (CHANGE)** in the function line.

b. Using the TAB key, move to the first null (.) line and type desired text. A null (.) line cannot exist between text lines, (.) must be spaced out. Skip to step 5.

Cross-Reference Steps

c. If overwriting existing text, with “CHANGE” still in the Function Line, tab to the Line Number field and enter “UPLD”. The UPLD process is required for text screens that pull a text description from a text data base (i.e. commodity data base CSPC or text data base TXLN). When using screens that access these text data bases (i.e. RMOD - OMOD - OCMD - KMOD - STXL) and the user needs to delete ALL text lines and completely overwrite the existing description from a text data base, the UPLD (upload) process must be followed. Using the TAB key, move to the first null (.) line and type desired text.

5. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display ‘PREVIOUS UPDATE SUCCESSFUL’.

# 9.14 Inquire Requisition Vendor Text Table

**Overview**

The AGPS user is provided the capability to inquire text for a requisition vendor text record. This is accomplished by the use of the RVTX screen.

**Inputs**

- Required solicitation number
- Required solicitation line number
- Required alternate bid code
- Required text action

**Outputs**

- Display of requested RVTX Table text

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine the requisition vendor text record for which the user will inquire text. |
| | 2. Inquire RVTX record text. |
| SDOC 4: RVTX | a. If you are not in the RVTX screen, type **RVTX** in the Function Line and press RETURN/ENTER. |
| | b. Type **G (GET)** in the Function Line. |
| | c. Using TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using TAB key, move to Solicitation Line field and type desired solicitation line number. |
| | e. Using TAB key, move to Alternate Bid Code field and type desired alternate bid code. |
| | f. Using TAB key, move to Text Action field and type desired text action. See Section 15, Miscellaneous Processing, General Text Processing, Chapter 2 for additional information. |
| | 3. Press RETURN/ENTER. |

| Cross-Reference | Steps |
|---|---|
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, the text line record should be displayed. |

# 10 PROCESSING BID TABULATION

## 10.1 Bid Tabulation General Information

### Overview

The AGPS user is provided the capability to process a bid tabulation for review and evaluation of bids recorded for a solicitation in AGPS. Bid tabulation may be processed with award, system determined low bidder based on bid tabulation type, or without award, buyer has to identify vendor to receive award manually. This is accomplished by the use of the SDOC screen.

The bid tabulation, regardless of the type ranking chosen, consists of four parts: basic solicitation information, ranked bids by line, summary of bids and vendor information. For the routine solicitation the bid tabulation should contain all the information necessary for the buyer to evaluate the bids.

Part 1: The basic solicitation information contains the obvious characteristics of the solicitation itself.

Part 2: The ranked bids by line shows all the line-level information about each vendor's bid ranked in the fashion chosen by the buyer. If the choice is line grouping, the bidders will be ranked on each line and a second ranking will be produced at the end of the group of all vendors eligible to receive an award of the entire group. A vendor is eligible to receive award of the entire group if the vendor bid on all items in the group.

Part 3: The vendor summary contains the vendor-level information from the solicitation and information from the Vendor database which may be useful in the evaluation process.

Part 4: The bid summary contains statistics on the number of vendors solicited and the number and percent responding, not responding and no-bidding. In addition, a summary of all bids showing the number of all lines bid and the total amount of each bid. For all lines on which a vendor is low bidder, the number and amount of the bid is shown.

Part 2 of a bid tabulation may be produced using one of five types of rankings: L-Low to High, D-Low to High considering prompt payment discount, H-High to Low, P-High to Low for percent off catalog discount and N-No Ranking. The buyer may choose one of these bid tabulation types on the solicitation as a whole and may choose other type rankings for the lines on the solicitation if needed. A vendor preference percent is not used to rank the bids. It is used to display a Vendor Preference Unit Price based on the percent claimed, applied to the lowest unit price.

L - Low-To-High: A **L** Bid Tab Type will result in the bids being arranged from the lowest unit price to the highest unit price, without regards to prompt payment discounts offered, for each line subject to this ranking of bids.

D - Low-To-High: A **D** Bid Tab Type will result in the bids being arranged from the lowest discounted unit price to the highest discounted unit price (unit price less discount) for each line subject to this ranking of bids.

H - High-To-Low: A **H** Bid Tab Type will result in the bids being arranged from the highest unit price to the lowest unit price, without regards to prompt payment discounts offered, for each line subject to this ranking of bids.

P - High-To-Low: A **P** Bid Tab Type will result in the bids being arranged from the highest discount % off catalog offered to the lowest for each line subject to this ranking of bids.

N - No Ranking: A **N** Bid Tab Type will result in the bids being arranged in the same order as the requisition vendor bid records in the RVEN Table for each line subject to this ranking of bids.

Bid Summary Part 1 and 2 is an additional part of the bid tabulation that is printed on a 378 Print Bid Tabulation With Summary print request. Part 1 provides a summary of bids by bid lines and part 2 provides a summary of bids by vendor. THIS DOES NOT PRINT AS PART OF THE ON-LINE PRINT.

Grouping is a method of ranking vendors across several lines on a bid tabulation. Groupings may be modified and the bid tabulation rerun. Groupings may be for any or all lines on the requisition, however, grouping one line to itself does not have any merit. The groupings for the bid tabulation would not normally be changed from the pattern that existed on the solicitation, but they may. A grouping indicator may be any two character code; the grouping can be changed by entering a different grouping indicator. It is suggested that the user adopts a logical pattern, for example, A, B, C etc. or 1, 2, 3, 4, etc. On the bid tabulation when a change in grouping indicator is detected, the bid tabulation will rank the eligible bidders and show the total bid for the grouping.

After recording the bids, there are conditions which may affect bid evaluation that the buyer should be aware. Though this information is presented on the bid tabulation, AGPS "highlights" this information for the buyer by indicating a variance does exist. The variances are shown on the far right of the bid tabulation printout. The variances are coded as follows:

C The commodity status has become inactive since the solicitation was mailed.

O There is some other or multiple condition which the buyer must examine the bid to determine.

P The unit price times the quantity does not equal the extended amount.

Q The quantity bid is not the same as the quantity requested on the solicitation.

R The vendor is located in a reciprocity state.

S The vendor has taken exception to some part of the description or specification for this line.

T The bid is tied with another bid.

U The unit of measure bid is not the same as the unit of measure requested on the solicitation.

V Vendor has become inactive since the solicitation was mailed.

When a variance appears on the bid tabulation, especially for the apparent low bidder, the buyer should resolve the situation before attempting to award to that bidder.

Vendors offer prompt payment discounts and these discounts may or may not be considered in the evaluation process. If Bid Tabulation Type is D, AGPS will automatically consider prompt payment discounts of the number of days specified in the BINS Table for evaluation process. If a prompt payment was considered on the bid tab, the unit price will be followed by an asterisk. The bid tabulation type chosen by the buyer determines if the prompt payment discount is considered. See this section for a discussion of bid tabulation types.

## Inputs

- Required solicitation number

## Outputs

- Updated SDOC Table
- Printed Bid Tabulation Documents

## Completing The Procedure

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation to process a bid tabulation. |

| Cross-Reference | Steps |
|---|---|
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| SDOC 4: RVEN | **Solicitation Number** must be key to a valid and active bid record recorded in the RVEN Table. |
| | 2. Change SDOC status to process bid tabulation without award in AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |
| | 3. Type **CHANGE** in the Function Line. |
| | a. Using the TAB key, move to Status Code field and type desired status code. See paragraph 10.4 or 10.5 below. |
| | 4. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |

# 10.2 Select Bid Tabulation Type

**Overview**

The AGPS user is provided the capability to select bid tabulation type for review and evaluation of bids recorded for a solicitation in AGPS. This is accomplished by the use of the SDOC screen for the solicitation as a whole (default) or the RLI3 screen at the requisition/solicitation line level.

**Inputs**

- Required solicitation number
- Required requisition number
- Required requisition line number

**Outputs**

- Updated SDOC/RLIN Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation and/or requisition/solicitation line number for selecting bid tabulation type (ranking). |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| RQSN 4: RLIN | **Requisition Number/Line Number** must be key to a valid and active line record recorded in the RLIN Table. |
| INST 4: BTAB | **Bid Tabulation Type** must be a valid entry in BTAB Table TB (Bid Tabulation Type). |
| | 2. Select bid tabulation for SDOC in AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |

| Cross-Reference | Steps |
|---|---|
| | 3. Type **CHANGE** in the Function Line. |
| | a. Using the TAB key, move to Type Bid Tabulation field and type desired bid tabulation type. |
| | NOTE: If the solicitation is requesting a percentage discount from a catalog, the bid tabulation type must be **P** in order to record the percentage. |
| | 4. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |
| | 5. Select bid tabulation for RLIN in AGPS. |
| RQSN 4: RLI3 | a. If the user is not in the RLI3 screen, type **RLI3** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Requisition Number field and type desired requisition number. |
| | d. Using the TAB key, move to Line Number field and type desired requisition line number. |
| | e. Press RETURN/ENTER. Requested requisition line record should be displayed. |
| | 6. Type **CHANGE** in the Function Line. |
| | a. Using the TAB key, move to Bid Tabulation Type field and type desired bid tabulation type. |
| | 7. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |

# 10.3 Group Solicitation/Requisition Lines

**Overview**

The AGPS user is provided the capability to group solicitation/requisition lines for review and evaluation of bids recorded for a solicitation in AGPS (e.g., component parts of a major unit, requires all or none bid). This is accomplished by the use of the RLI2 screen.

**Inputs**

- Required requisition number
- Required requisition line number

**Outputs**

- Updated RLIN Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine requisition lines to be grouped for bid evaluation. |
| RQSN 4: RLI2 | Requisition/**Line Number** must be key to a valid and active requisition line record in the RLIN Table. |
| | 2. Group RLIN records in AGPS. |
| RQSN 4: RLI2 | a. If the user is not in the RLI2 screen, type **RLI2** in the Function Line and press RETURN/ENTER. |
| | b. Using the procedures of Section 6 Requisition Processing, Chapter 2, 2.2 Change Requisition Line Table, type desired Grouping Indicator. |
| | 3. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |

# 10.4 Process Bid Tabulation Without Award

**Overview**

The AGPS user is provided the capability to process a bid tabulation for review and evaluation of bids recorded for a solicitation in AGPS. The basic purpose of the bid tabulation is to present the vendor's bids to the buyer in a predetermined fashion. The manner in which these bids are presented is a choice made by the buyer through setting the bid tabulation type codes on either the solicitation or the lines on the solicitation. This is accomplished by the use of the SDOC screen.

**Inputs**

- Required solicitation number

**Outputs**

- Updated SDOC Table
- Printed Bid Tabulation Documents

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation to process a bid tabulation without award. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| SDOC 4: RVEN | **Solicitation Number** must be key to a valid and active bid record recorded in the RVEN Table. |
| | 2. Change SDOC status to process bid tabulation without award in AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |
| | 3. Type **CHANGE** in the Function Line. |

Cross-Reference Steps

a. Using the TAB key, move to Status Code field and type desired status code.

| IF... | THEN... |
|---|---|
| Print over night (without bid summary) | Type status code = **375** |

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

# 10.5 Process Bid Tabulation With Proposed Award

## Overview

The AGPS user is provided the capability to process a bid tabulation with proposed award for review and evaluation of bids recorded for a solicitation in AGPS. AGPS provides the ability to set the award flags on the apparent low vendor automatically so that awards will be made to those vendors if the buyer agrees. The purpose of the proposed award process is solely to minimize the number of keystrokes that the buyer must make. The proposed award process is requested in conjunction with requesting a bid tabulation. The preliminary award process will work only when conditions are favorable, that is, the apparent low bidder may not have any variances. The bid must be "clean" for AGPS to make a proposed award. AGPS will skip all lines where the low bidder has a variance. This is accomplished by the use of the SDOC screen.

## Inputs

- Required solicitation number

## Outputs

- Updated SDOC/RVEN Table
- Printed Bid Tabulation Documents

## Completing The Procedure

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation to process a bid tabulation with proposed award. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| SDOC 4: RVEN | **Solicitation Number** must be key to a valid and active bid record recorded in the RVEN Table. |
| | 2. Change SDOC status to process bid tabulation with proposed award in AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |

| Cross-Reference | Steps |
|---|---|

3. Type **CHANGE** in the Function Line.

   a. Using the TAB key, move to Status Code field and type **370**. The Auto Award process sets the recommended vendors award flags to **'S'** as long as there is no variance. If variances occur, the status code will be set to **'372'** - Auto Awrd Fail - Buyer Must Awrd.

4. Press RETURN/ENTER.

   NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

# 11 AWARDING SOLICITATIONS

## 11.1 Award Multiple Vendors For A Solicitation Line

**Overview**

The AGPS user is provided the capability to identify multiple vendors for award of a specific solicitation line in AGPS. It may be necessary for the buyer to award a single line to more than one vendor as in the case of a true "multiple award". This may result from the way bids are received or may have been contemplated in the solicitation. This is accomplished by the use of the RLI2 screen.

**Inputs**

- Required solicitation requisition number
- Required requisition/solicitation line

**Outputs**

- Updated RLIN/RVEN Table

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation lines subject to multiple award. |
| RQSN 4: RLI2 | **Requisition/Line Number** must be key to a valid and active requisition line record in the RLIN Table. |
| | 2. Change RLIN status to process multiple awards in AGPS. |
| RQSN 4: RLI2 | a. If the user is not in the RLI2 screen, type **RLI2** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Requisition Number field and type desired requisition number. |
| | d. Using the TAB key, move to Line Number field and type desired requisition line number. |
| | e. Press RETURN/ENTER. Requested requisition line record should be displayed. |
| | 3. Type **CHANGE** in the Function Line. |

| Cross-Reference | Steps |
|---|---|

a. Using the TAB key, move to Status Code field and type **243**.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

The buyer may now set award flag to Y on more than one vendor for solicitation/requisition line. Proceed to paragraph 11.4 step 7.

# 11.2 Partial Award Of A Solicitation

## Overview

The AGPS user is provided the capability to process partial award of a solicitation, processing those solicitation/requisitions lines identified for award (award flag = S, Y, or U) until all lines can be awarded on a solicitation. AGPS allows some lines to be awarded now and other lines to be awarded at a later time. The buyer would set the award flags on those lines to be awarded now and set the solicitation status code to partial award. Some time later, the other award flags may be set and the solicitation status code set again to partial award. This is accomplished by the use of the SDOC screen.

## Inputs

- Required solicitation number

## Outputs

- Updated SDOC/RVEN Table
- Processed award documents

## Completing The Procedure

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation to be awarded. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| SDOC 4: RVEN | **Solicitation Number** must be key to a valid and active bid record recorded in the RVEN Table with award flag equal **S**, **Y**, or **U**. |
| INST 4: BIN3 | An on-line award is subject to the limitations on BIN3, and the On-line Award indicator on BIN3 must be **Y**. |
| | 2. Change SDOC status to process award in AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |

Cross-Reference Steps

d. Press RETURN/ENTER. Requested solicitation record should be displayed.

3. Type **CHANGE** in the Function Line.

a. Using the TAB key, move to Status Code field and type:

**379** - Partial Award On-Line
**380** - Partial Award (Overnight)

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

# 11.3 Partial Award/Re-Bid Of A Solicitation

**Overview**

The AGPS user is provided the capability to process a partial award of a solicitation, processing those solicitation/requisitions lines identified for award (award flag = S, Y, or U), and re-bid the balance of the items. AGPS allows some lines to be awarded now, and other lines to be re-bid. The buyer would set the award flags on those lines to be awarded now, and set the solicitation status code to partial award. Once the award document(s) is created, the solicitation status code can be set to re-bid. This is accomplished by the use of the SDOC screen.

**Inputs**

- Required solicitation number

**Outputs**

- Updated SDOC/RVEN Table
- Processed award documents

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation to be awarded. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| SDOC 4: RVEN | **Solicitation Number** must be key to a valid and active bid record recorded in the RVEN Table with award flag equal **S**, **Y**, or **U**. |
| INST 4: BIN3 | An on-line award is subject to the limitations on BIN3, and the On-line Award indicator on BIN3 must be **Y**. |
| | 2. Change SDOC status to process award in AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |

| Cross-Reference | Steps |
|---|---|
| | 3. Type **CHANGE** in the Function Line. |
| | a. Using the TAB key, move to Status Code field and type:<br><br>**379** - Partial Award On-Line<br>**380** - Partial Award (Overnight) |
| | 4. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |
| | 5. Change SDOC status to re-bid. After the award document(s) is created, set the solicitation status code to re-bid. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |
| | 6. Type **CHANGE** in the Function Line. |
| | a. Using the TAB key, move to Status Code field and type **305**. |
| | 7. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.<br><br>This deletes all previously recorded RVEN records for solicitation lines with award flag equal **N**. Then, if the requisition has to be re-worked, using the procedures of 2.2 Delete Solicitation Requisition Number, un-attach the requisition from the solicitation. The requisition can then<br><br>be returned for re-work following the procedures in Section 6, |

| Cross-Reference | Steps |
| --- | --- |
| | Requisition Processing. When the requisition is ready to be re-bid, it can be re-attached to the same solicitation. |

## 11.4 Award Solicitation With Proposed Award

**Overview**

The AGPS user is provided the capability to process award for a solicitation that has had bid tabulation with proposed award processing without the user setting award flags. AGPS will set the award flag to S (for System) on all the apparent low bidders. If the buyer agrees with in the manner AGPS has set the awards, the buyer may continue the award process. This is accomplished by the use of the SDOC screen.

**Inputs**

- Required solicitation number

**Outputs**

- Updated SDOC/RVEN Table
- Processed award documents

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation to be awarded. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| SDOC 4: RVEN | **Solicitation Number** must be key to a valid and active bid record recorded in the RVEN Table with award flag equal **S**. |
| | 2. Change SDOC status to process award in AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Press RETURN/ENTER. Requested solicitation record should be displayed. |
| | 3. Type **CHANGE** in the Function Line. |
| INST 4: BIN3 | An on-line award is subject to the limitations on BIN3, and the On-line Award indicator on BIN3 must be **Y**. |

Cross-Reference Steps

a. Using the TAB key, move to Status Code field and type:

**379** - Partial Award On-Line
**380** - Partial Award (Overnight)
**384** - Final Award On-Line
**385** - Final Award (Overnight)

NOTE: All requisition lines must be awarded or canceled (RLIN status = 196/199/243/244) before the solicitation status can be changed to final award.

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

# 11.5 Award Solicitation Without Proposed Award

**Overview**

The AGPS user is provided the capability to process award for a solicitation by setting award flags in the RVEN record. Additionally, if the user does not agree with a proposed award resulting from processing bid tabulation with proposed award, the buyer may override AGPS. This is accomplished by the use of the RVE2 or RVEV and SDOC screens.

**Inputs**

- Required solicitation number
- Required solicitation line number
- Required alternate bid code
- Required vendor number

**Outputs**

- Updated SDOC/RVEN Table
- Processed award documents

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation to be awarded. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| SDOC 4: RVEN | **Solicitation Number/Line Number/Alternate Bid Code/Vendor Number** must be key to a valid and active bid record recorded in the RVEN Table. |
| INST 4: BIN3 | An on-line award is subject to the limitations on BIN3, and the On-line Award indicator on BIN3 must be **Y**. |
| | 2. Manually override proposed award(s) in AGPS using RVE2. |
| SDOC 4: RVE2 | a. If the user is not in the RVE2 screen, type **RVE2** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |

| Cross-Reference | Steps |
|---|---|
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using the TAB key, move to Line Number field and type desired solicitation line number. |
| | e. Using the TAB key, move to Alt Bid Code field and type desired alternate bid indicator. Must be **00** if not an alternate bid. |
| | f. Using the TAB key, move to Vendor Number field and type desired vendor number. |
| | g. Press RETURN/ENTER. Requested requisition line bid record should be displayed. |
| | 3. Type **CHANGE** in the Function Line. |
| | a. Using the TAB key, move to Award Flag field and type **N** in place of the **S** award flag. |
| | OR |
| | 4. Manually override proposed award(s) in AGPS using RVEV. |
| SDOC 4: RVEV | a. If the user is not in the RVEV screen, type **RVEV** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using the TAB key, move to Vendor Number field and type desired vendor number. |
| | e. Using the TAB key, move to Line Number field and type desired solicitation line number. |
| | f. Using the TAB key, move to Alt Bid Code field and type desired alternate bid indicator. Must be **00** if not an alternate bid. |
| | g. Press RETURN/ENTER. Requested requisition line bid record should be displayed. |

| Cross-Reference | Steps |
|---|---|
| | 5. Type **CHANGE** in the Function Line. |
| | a. Using the TAB key, move to Award field and type **N** in place of the **S** award flag. |
| | 6. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |
| | 7. Identify awarded vendor in AGPS using RVE2. |
| SDOC 4: RVE2 | a. If the user is not in the RVE2 screen, type **RVE2** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using the TAB key, move to Line Number field and type desired solicitation line number. |
| | e. Using the TAB key, move to Alt Bid Code field and type desired alternate bid indicator. Must be **00** if not an alternate bid. |
| | f. Using the TAB key, move to Vendor Number field and type desired vendor number. |
| | g. Press RETURN/ENTER. Requested requisition line bid record should be displayed. |
| | 8. Type **CHANGE** in the Function Line. |
| | a. Using the TAB key, move to Award Flag field and type **Y** in place of the **N** or **U** award flag. |
| | OR |
| | 9. Manually override proposed award(s) in AGPS using RVEV. |

| Cross-Reference | Steps |
|---|---|
| SDOC 4: RVEV | a. If the user is not in the RVEV screen, type **RVEV** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |
| | d. Using the TAB key, move to Vendor Number field and type desired vendor number. |
| | e. Using the TAB key, move to Line Number field and type desired solicitation line number. |
| | f. Using the TAB key, move to Alt Bid Code field and type desired alternate bid indicator. Must be **00** if not an alternate bid. |
| | g. Press RETURN/ENTER. Requested requisition line bid record should be displayed. |
| | 10. Type **CHANGE** in the Function Line. |
| | a. Using the TAB key, move to Award field and type **Y** in place of the **N** or **U** award flag. |
| | 11. Press RETURN/ENTER. |
| | NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'. |
| | 12. Change SDOC status to process award in AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Type **INQUIRE** in the Function Line. |
| | c. Using the TAB key, move to Solicitation Number field and type desired solicitation number. |

Cross-Reference Steps

d. Press RETURN/ENTER. Requested solicitation record should be displayed.

13. Type **CHANGE** in the Function Line.

a. Using the TAB key, move to Status Code field and type:
**379** - Partial Award On-Line
**380** - Partial Award (Overnight)
**384** - Final Award On-Line
**385** - Final Award (Overnight)

NOTE: All requisition lines must be awarded or canceled (RLIN status = 196/199/243/244) before the solicitation status can be changed to final award.

14. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

# 11.6 Award Alternate Bids

**Overview**

The AGPS user is provided the capability to process award for an alternate bid in AGPS. The buyer may award an alternate bid in the same manner as awarding the primary bid. When inquiring the vendor's bid, include the alternate bid code in the key and use the procedures discussed above for setting award flags. This is accomplished by the use of the RVE2 or RVEV and SDOC screens.

**Inputs**

- Required solicitation number
- Required solicitation line number
- Required alternate bid code
- Required vendor number

**Outputs**

- Updated SDOC/RVEN Table
- Processed award documents

**Completing The Procedure**

| Cross-Reference | Steps |
|---|---|
| | 1. Determine alternate bid(s) to be awarded. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| SDOC 4: RVEN | **Solicitation Number/Line Number/Alternate Bid Code/Vendor Number** must be key to a valid and active bid record recorded in the RVEN Table. |
| | 2. Change RVEN award flag for an alternate bid in AGPS using RVE2. |
| SDOC 4: RVE2 | a. If the user is not in the RVE2 screen, type **RVE2** in the Function Line and press RETURN/ENTER. |
| | b. Using the procedures of 11.4 above, set alternate bid award flag to **Y**. |
| | OR |
| | 3. Change RVEN award flag for an alternate bid in AGPS using RVEV. |

| Cross-Reference | Steps |
|---|---|
| SDOC 4: RVEV | a. If the user is not in the RVEV screen, type **RVEV** in the Function Line and press RETURN/ENTER. |
| | b. Using the procedures of 11.4 above, set alternate bid award flag to **Y**. |
| | 4. Change SDOC status to process award in AGPS. |
| SDOC 4: SDOC | a. If the user is not in the SDOC screen, type **SDOC** in the Function Line and press RETURN/ENTER. |
| | b. Using the procedures of 11.4 above, set the SDOC status to the desired award processing. |

# 11.7 Re-Award Solicitation After Order Cancellation

## Overview

The AGPS user is provided the capability to re-award a solicitation line(s) by re-setting the award flags in the RVEN record. This can only be accomplished after a successful cancellation of the order or order line(s) using the order change process. This is accomplished by the use of the RVE2 or RVEV and SDOC screens.

## Inputs

- Required solicitation number
- Required solicitation line number
- Required alternate bid code
- Required vendor number

## Outputs

- Updated SDOC/RVEN Table
- Processed award documents

## Completing The Procedure

| Cross-Reference | Steps |
|---|---|
| | 1. Determine solicitation to be re-awarded. |
| SDOC 4: SDOC | **Solicitation Number** must be key to a valid and active solicitation record in the SDOC Table. |
| SDOC 4: RVEN | **Solicitation Number/Line Number/Alternate Bid Code/Vendor Number** must be key to a valid and active bid record recorded in the RVEN Table. The award flag on the solicitation line(s) to be re-awarded must be **U**. |
| INST 4: BIN3 | An on-line award is subject to the limitations on BIN3, and the On-line Award indicator on BIN3 must be **Y**. |
| | 2. Re-award solicitation line(s) to another vendor. |
| | a. Using procedures of 9.1 Prepare Solicitation to Record Bids, change the solicitation status to **365**. |
| | b. Using procedures of 11.5 Award Solicitation Without Proposed Award, change the solicitation line(s) award flag to **Y**. |

# 12 INQUIRE SOLICITATION RECORDS

## 12.1 Inquire Solicitation Database Records

**Overview**

The AGPS user is provided the capability to inquire solicitation database record information in various formats using various keys. This is accomplished with desired inquiry screen.

**Inputs**

- Required inquiry screen
- Required key(s) for inquiry

**Outputs**

- Display of requested solicitation record data

**Completing The Procedure**

Cross-Reference | Steps

1. Determine solicitation data to be inquired and the inquiry screen/key(s) to be used.

2. Inquire solicitation database record data in AGPS.

   a. If the user is not in the desired inquiry screen, type desired inquiry screen identifier in the Function Line and press RETURN/ENTER.

   b. Type **INQUIRE** in the Function Line.

   c. Using the TAB key, move to the required key field(s) and type the required key.

3. Press RETURN/ENTER.

   NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display requested record data.

   The following inquiry screens are provided for inquiry of the Solicitation Database.

| Cross-Reference | Steps | |
|---|---|---|
| SDOC 4: RVEN | **RVEN** | - Requisition Vendors Table #1: This inquiry screen is used for display of a listing of vendor's bids recorded for a solicitation/ requisition line. Key is solicitation number, line number and vendor number. |
| SDOC 4: SASC | **SASC** | - Solicitation Amendments By Status Code Table: This inquiry screen is used for inquiry of solicitations amendments by status code. Key is solicitation status, solicitation number, and solicitation amendment number. |
| SDOC 4: SBST | **SBST** | - Solicitation By Purchasing Agency, Buyer And Status Code: This inquiry screen is used for inquiry of solicitations by purchasing agency, buyer code and status code. Key is purchasing agency, buyer code, solicitation status code and solicitation number. |
| SDOC 4: SDOT | **SDOT** | - Solicitation by Purchase Agency, Document Type And Date Created: Provides the user with the ability to INQUIRE the Solicitation database by purchasing agency, document type, date created and solicitation number. The screen will display a list of solicitations for the requested key(s). Key is purchase agency, document type, date created and solicitation. |
| SDOC 4: SLIN | **SLIN** | - Solicitation Line Table #1: This inquiry screen is used for inquiry of solicitation line data. Key is solicitation number, line number, requisition number and requisition line number. |
| SDOC 4: SSTA | **SSTA** | - Solicitation By Status Code: This inquiry screen is used for inquiry of solicitations by status code. Key is solicitation status and solicitation number. |
| SDOC 4: STLE | **STLE** | - Solicitation By Title: This inquiry screen is used for inquiry of solicitations by title. Key is solicitation title line 1 and solicitation number. |
| SDOC 4: SVEN | **SVEN** | - Solicitation Vendor Table #1: This inquiry screen is used for inquiry of solicitation vendors by solicitation number. Key is solicitation number and vendor number. |