

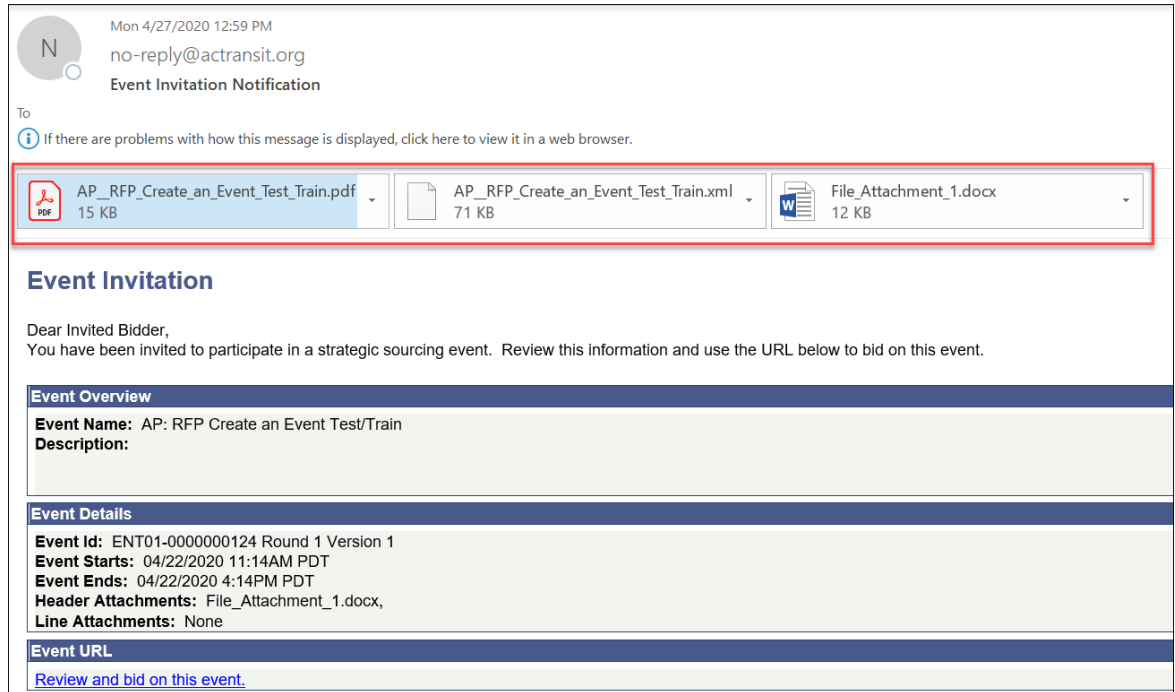


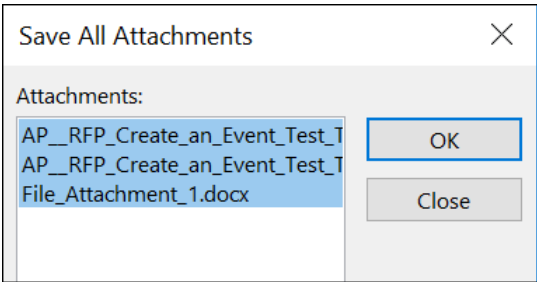
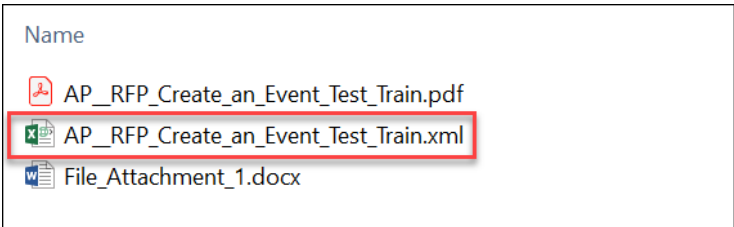
Uploading Proposals for Submission

Supplier Portal Training Quick Reference Guide

Task: Respond to a Bid and Solicitation by uploading an XML file and submitting the response Online

- Bidder:**
- Bidder receives an email for an Event
 - A Bidder receives an Event Invitation Notification. The email may contain the PDF file, XML file and all associated file attachments of an Event

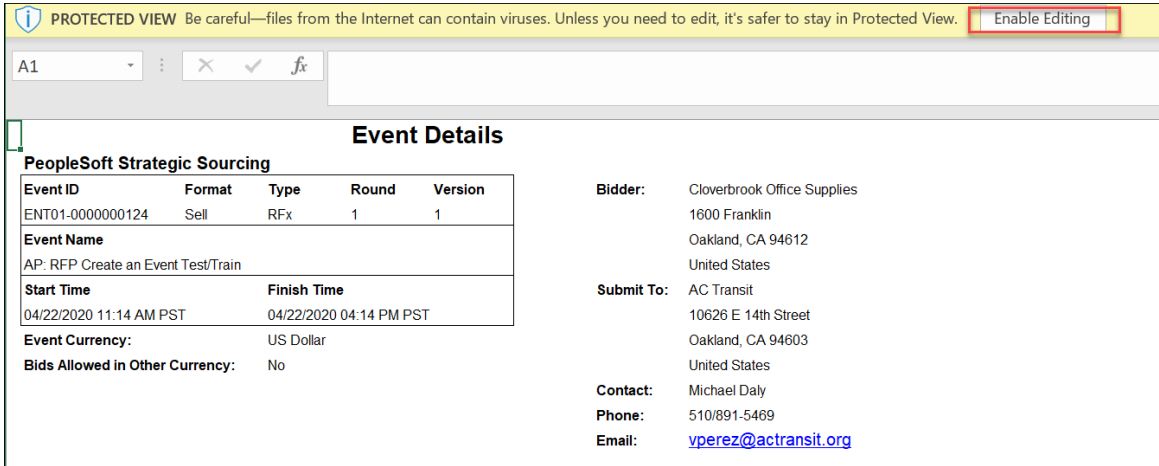
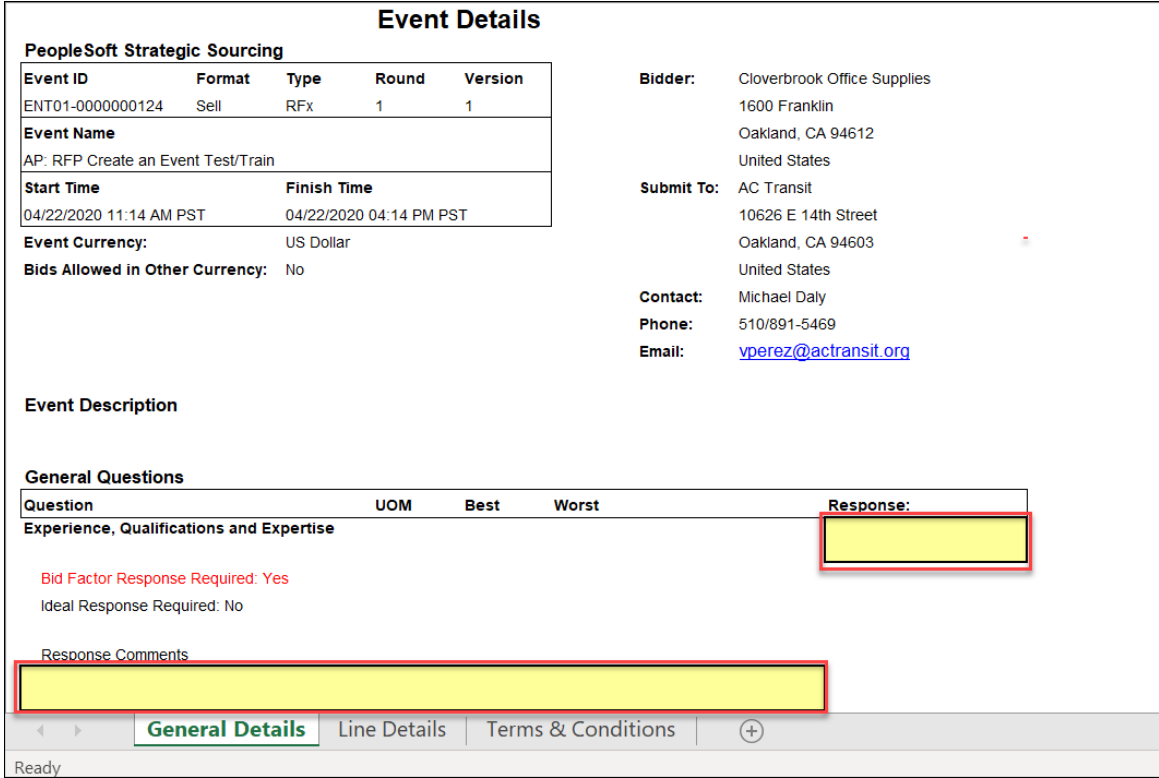
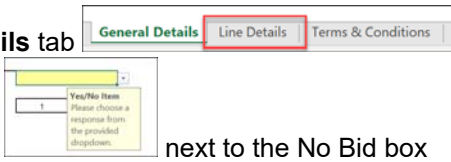


Step	Instructions
1	<ul style="list-style-type: none">To submit response via XML, click the file and save all attachments in your documents folderClick Event URL Review and bid on this event. 
2	<ul style="list-style-type: none">Open MS ExcelNavigate to your documents file folder then click the XML file to openClick the Enable Editing box 



Uploading Proposals for Submission

Strategic Sourcing Training Quick Reference Guide

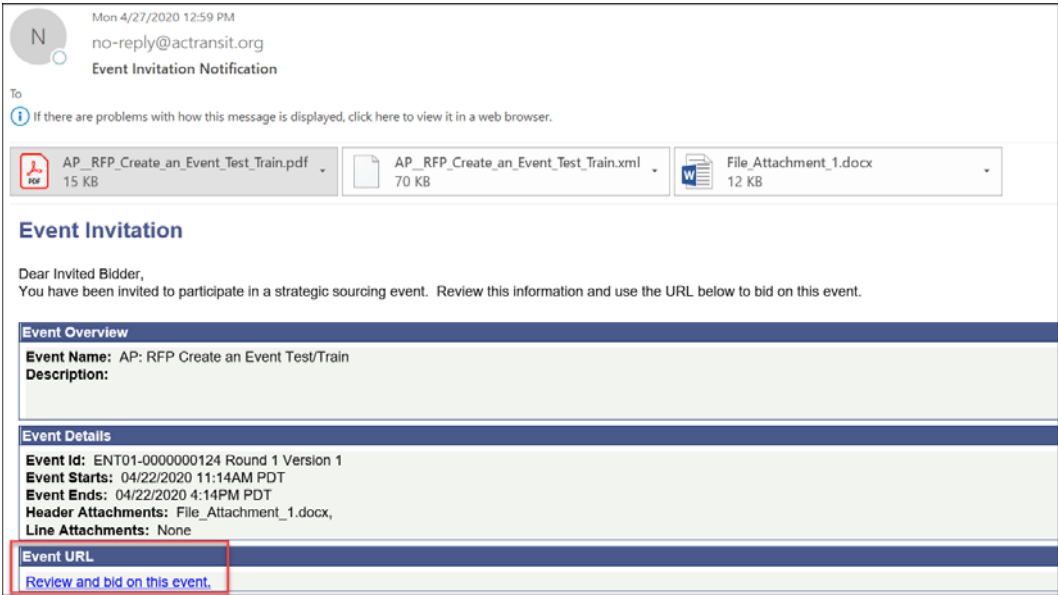


Step	Instructions
	
3	<ul style="list-style-type: none">On the General Details tab, answer all General Questions with Bid Factor Response Required: YesEnter each Response for each question in the Response and Response Comments box 
4	<ul style="list-style-type: none">Go to the Line Details tabSelect Yes/No Item next to the No Bid boxEnter the Price Per Item in the Response box (Repeat these steps for Events with multiple line items) 

Step	Instructions
	<div> <div>Line Details</div> <div> <div>No Bid</div> <div></div> </div> <div> <div>Line: 1</div> <div>Item ID:</div> <div>Line Quantity: 1</div> <div>UOM: HR</div> <div>Quantity: 1</div> </div> <div> <div>Bid Required: No</div> <div>Reserve Price: No</div> <div>Description: Event to Create an RFP</div> </div> <div>The requested quantity is required. You cannot change the quantity for this line.</div> <div> <div>Price Details</div> <div>Best</div> <div>Worst</div> <div>Response:</div> </div> <div> <div>Quantity Details</div> <div>Requested</div> <div>Minimum Quantity: 0</div> <div>Maximum Quantity: 1</div> </div> </div>
5	<ul style="list-style-type: none"> Read the terms and conditions in the Terms and Conditions tab <div> <div>General Details</div> <div>Line Details</div> <div>Terms & Conditions</div> </div> <div> <div>PeopleSoft Strategic Sourcing</div> <div> <div>Event ID</div> <div>Format</div> <div>Type</div> <div>Round</div> <div>Version</div> </div> <div> <div>Event Name</div> <div>Start Time</div> <div>Finish Time</div> <div>Event Currency:</div> <div>Bids Allowed in Other Currency:</div> </div> <div> <div>Bidder:</div> <div>Submit To:</div> <div>Contact:</div> <div>Phone:</div> <div>Email:</div> </div> <div>Terms & Conditions</div> </div>
6	<ul style="list-style-type: none"> Save the document from File, Save As, enter a file name and click Save Click Yes to the Microsoft Excel pop-up message <div> <div>File</div> <div>Normal P</div> <div>Save</div> <div>Save As</div> <div>Documents > APEREZ > PS StratSrcing > PS SS Testing Results > XML > 124b</div> <div>AP_RFP_Create_an_Event_Test_Train_REPLY</div> <div>XML Spreadsheet 2003 (*.xml)</div> <div>More options...</div> <div>Save</div> </div> <div> <div>Microsoft Excel</div> <div>Some features in your workbook might be lost if you save it as XML Spreadsheet 2003.</div> <div>Do you want to keep using that format?</div> <div>Yes</div> <div>No</div> <div>Help</div> </div>



Uploading Proposals for Submission

Strategic Sourcing Training Quick Reference Guide

Step	Instructions
7	<ul style="list-style-type: none">Go back to your Inbox and navigate to the Event Invitation NotificationClick the Event URL Review and bid on this event. 
8	<ul style="list-style-type: none">Takes you to PeopleSoft Sign-on pageEnter User ID and Password and click Sign In 
9	<ul style="list-style-type: none">Takes you to the Bidding Home PageClick Click here to place a bid on Event: ENT01 - 0000000124 AP: RFP Event Response XML/Hard copy 

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- Select and click the **Upload bid via Excel/XML** link
- Click 

Click here to place a bid on Event: ENT01 - 0000000124 AP: RFP Event Response XML/Hard copy

Bidding Choices:

- [Bid using online entry](#)
- [Upload bid via Excel/XML](#)**
- [Download bid package and other associated files](#)

Select this choice if you need the PDF or Excel version of the event.

Sourcing Bidder Homepage **Upload Bid**

Welcome, Cloverbrook Office Supplies
User: Clover

Upload Bid

Event ID	ENT01-0000000124	Format	Buy	Type	RFX
Round	1	Version	2		
Event Name	AP: RFP Event Response XML/Hard copy				
Start Date	04/28/2020 6:30AM PDT	End Date	04/29/2020 3:00PM PDT		

Select XML File [Return to Bidding Homepage](#)

To upload a bid:

1. Open the Excel version of this event that you have been working with.
2. Do a File->Save As. Before hitting save, make sure to change the "Save as Type" to "XML Spreadsheet".
3. Using the Select XML File Button, select the XML Spreadsheet that was just saved.
4. Verify the path showing is correct and push the Upload button.

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- File Attachment page appears
- Click Browse to select the XML file with the response from your documents folder and click Upload

File Attachment

C:\Users\vperez\Documents\APERE Browse...

Upload **Cancel**

- AP_RFP_Create_an_Event_Test_Train.pdf
- AP_RFP_Create_an_Event_Test_Train.xml
- AP_RFP_Create_an_Event_Test_Train_REPLY.xml**
- File_Attachment_1.docx

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- Takes you to the Event Details page appears
- Click **Validate Entries** button and ensure there are **No Errors Found** in the uploaded file, then click **OK**

Bid Upload **Event Details**

New Window | Help | Personalize Page

Welcome, Cloverbrook Office Supplies
User: Clover

Event Details

Submit Bid **Save for Later** **Validate Entries**

Event Name AP: RFP Event Response XML/Hard copy

Event ID ENT01-0000000124 Bid ID 1

Event Format/Type Sell Event RFX Bid Date

Event Round 1 Bid Currency USD US Dollar

Event Version 2

Event Start Date 04/28/2020 6:30AM PDT

Event End Date 04/29/2020 03:00 PM PDT

[Hide Additional Event Info](#)

Description:

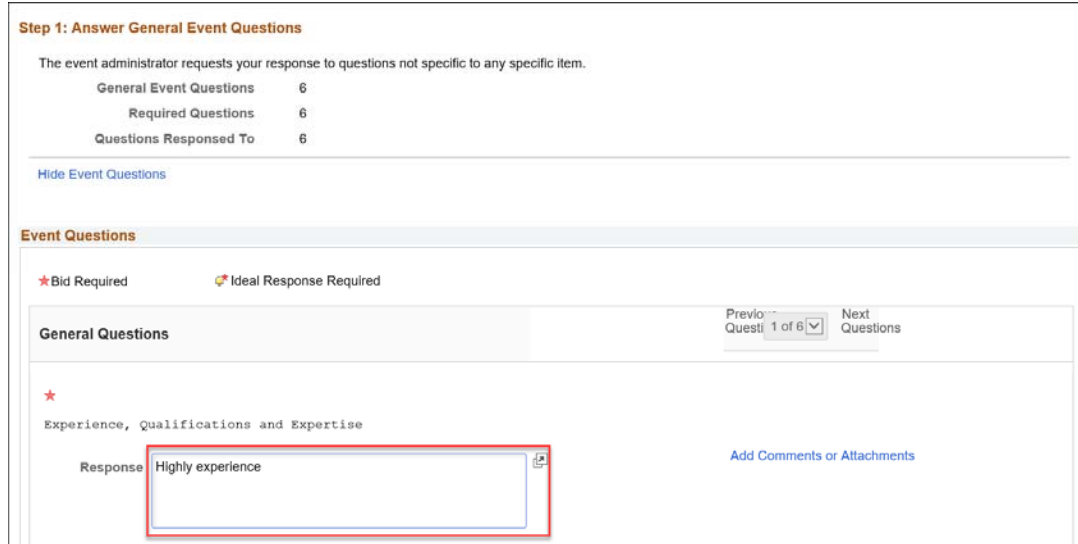
No errors found. (18058,313)

OK

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From **Step 1: Answer General Event Questions**

- Review each of the General Event Questions and the Responses



Step 1: Answer General Event Questions

The event administrator requests your response to questions not specific to any specific item.

General Event Questions	6
Required Questions	6
Questions Responded To	6

[Hide Event Questions](#)

Event Questions

★ Bid Required 🏆 Ideal Response Required


General Questions

Previous Questions: 1 of 6 Next Questions

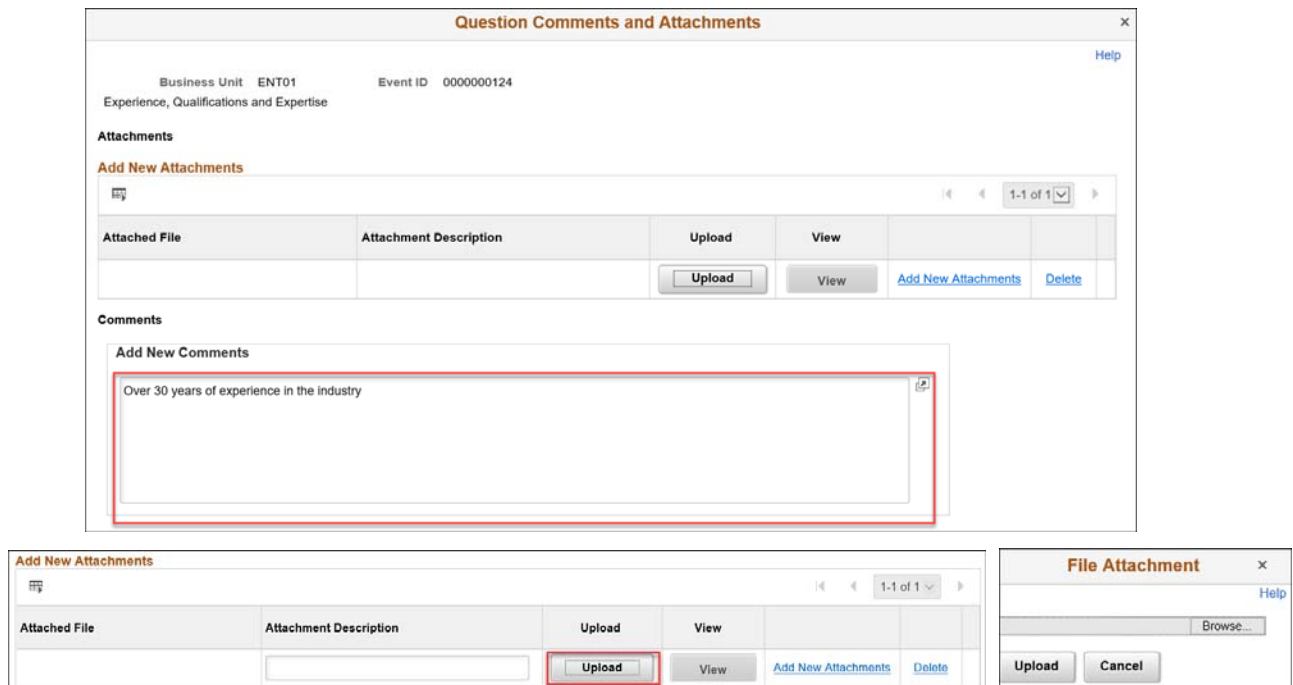
★ Experience, Qualifications and Expertise

Response: [Add Comments or Attachments](#)

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 Additional Response for Every Question

- Click [Add Comments or Attachments](#) link to each to confirm responses are uploaded
 - Enter additional response for every Question in the **Add New Comments** field
 - To upload a file as additional response for every Question, click [Upload](#)
 - File Attachment page appears, click Browse to search and select the file and click [Upload](#)
 - To add more attachments, click the [Add New Attachments](#) link
- Click [OK](#) to take you back to the Event Details page



Question Comments and Attachments

Business Unit: ENT01 Event ID: 0000000124

Experience, Qualifications and Expertise

Attachments

[Add New Attachments](#)

Attached File	Attachment Description	Upload	View
		Upload	View

Comments

[Add New Comments](#)

Add New Attachments

Attached File	Attachment Description	Upload	View
		Upload	View

File Attachment

[Browse...](#)

[Upload](#) [Cancel](#)

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From **Step 2: Answer General Event Questions**

- Click to uncheck the No Bid checkbox

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event 1
Lines Responded To 1
Your Total Line Pricing 0.0000 USD

[Hide Line Detail](#)

★ Bid Required [Line Comments/Files](#)

Lines

Line	Description	Unit	Requested Quantity	Your Bid Quantity	Your Unit Bid Price	No Bid	Your Total Bid Price		
1	Event to Create an RFP	HR	1.0000			<input checked="" type="checkbox"/>	0.0000 USD	Bid	

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- Your Unit Bid Price field becomes available, a unit bid price for the Line Item
- Click the Bid link of the Line Item [Bid](#)

Lines

Line	Description	Unit	Requested Quantity	Your Bid Quantity	Your Unit Bid Price	No Bid	Your Total Bid Price		
1	Event to Create an RFP	HR	1.0000		<input type="text"/>	<input type="checkbox"/>	0.0000 USD	Bid	

Lines

Line	Description	Unit	Requested Quantity	Your Bid Quantity	Your Unit Bid Price	No Bid	Your Total Bid Price		
1	Event to Create an RFP	HR	1.0000		<input type="text"/>	<input type="checkbox"/>	0.0000 USD	Bid	

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The Bid Link takes you to the Line Item page

- You can also enter Bid Price in the **Your Unit Bid Price** field (if it is not yet entered)
- Click to enter Comments or file attachments in the [View/Add Question Comments and Attachments](#)
- Click [Validate Entries](#) to make sure there are no errors found
- Click [Save for Later](#) to save entries
- Click [Start Page](#) to take you back to the Event Details page



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Strategic Sourcing Training Quick Reference Guide

Bid Upload Line Details

Line 1 of 1

Line Details

Event to Create an RFP

Category: Miscellaneous Services

[View/Add Question Comments and Attachments](#)

Unit of Measure: Hour
Qty Requested: 1.0000
Your Max Bid Quantity
Max Quantity: 1.0000

Your Unit Bid Price
Total Bid Price: 0.0000 USD
Reserve Price: No

Shipping Information

Ship Quantity	Due Date	Ship To Location	Ship Via	Freight Terms
1.0000	04/27/2020	CFWA	View	

Item Specification

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- Click for Line Comments and Attachments
- Enter Comments in the Add New Comments field
- Click to upload a file. File Attachment page appears. Click Browse to search file in your documents folder then click . Enter an Attachment Description.
- To add new attachment, click the Add New Attachments link
- Click to take you back to the Event Details page

Line	Description	Unit	Requested Quantity	Your Bid Quantity	Your Unit Bid Price	No Bid	Your Total Bid Price	Bid
1	Event to Create an RFP	HR	1.0000			<input type="checkbox"/>	0.0000 USD	

Line Comments and Attachments

Event ID: 000000124 Line: 1

Event to Create an RFP

Attachments

Add New Attachments


Attached File	Attachment Description	Upload	View


Comments

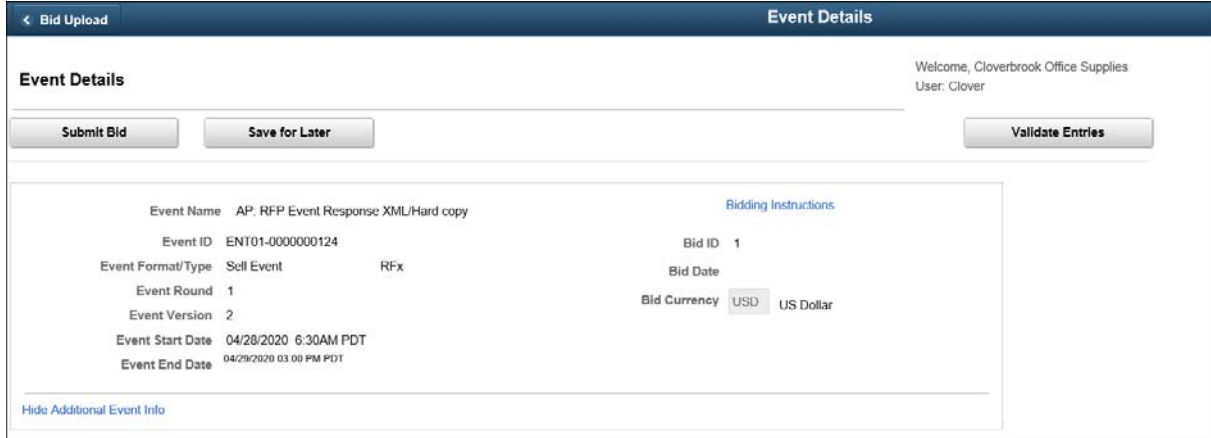
Add New Comments

File Attachment

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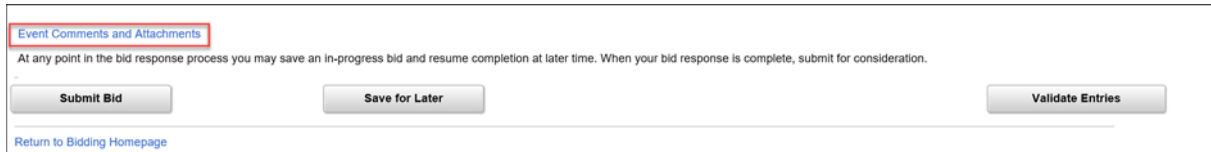
 Takes you back at the Event Details page

- Click  to Save all entries



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- Scroll down towards the bottom of the page
- Click the [Events Comments and Attachments](#) link



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- The Event Package (PDF, XML), Attachments, Addendums, Comments/Announcements from AC Transit are listed under the View Event Attachments
- To upload your entire **File Proposal and Response to AC Transit**, click the Upload button
 - Browse the file and Upload
- Enter an Attachment Description
- Click the [Add New Attachments](#) link for additional files to Upload
- Enter any Comments in the **Add New Comments** box
- Click the OK button



Event Comments and Attachments

Add New Attachments ?

Attached File	Attachment Description	Upload	View		
File_Attachment_-_Proposal_to_AC_Transit.docx	Proposal Response to AC Transit	Upload	View	Add New Attachments	Delete

Comments

View Event Comments ?

Description
The Alameda-Contra Costa Transit District (the "District") is requesting proposals from qualified firms to provide public outreach consulting services in support of the District's plan to possibly place a revenue measure for voter approval in the 2020 general election. The successful proposer will perform a Feasibility Assessment for such a measure, evaluating demographic trends among voters in the District and projected voter turnout, working with a pollster to understand current voter perceptions and needs. If the such a revenue measure proves feasible, the selected firm will Develop and refine a revenue measure for the ballot, determining the most favorable type of assessment; Develop and implement a public information and awareness program, selecting and supervising graphic designers, media outlets and other vendors associated with such an outreach effort. Prepare a seventy-five (75) Word Ballot Question and Provide Ongoing

File Attachment

Browse...

Upload Cancel

Add New Comments ?

OK Cancel

22

Takes you back to the Event Details page

- Click **Save for Later** to Save all entries
- Click **Validate Entries**
- Click OK if No errors are found in your entries
- Click **Submit Bid**

Event Comments and Attachments

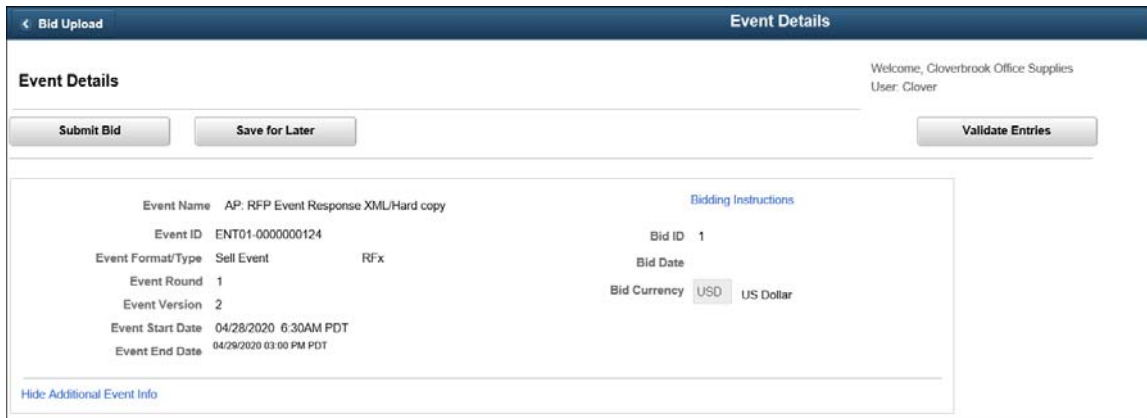
At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

Submit Bid Save for Later Validate Entries

[Return to Create Bidder Response](#)

No errors found. (18058,313)

OK




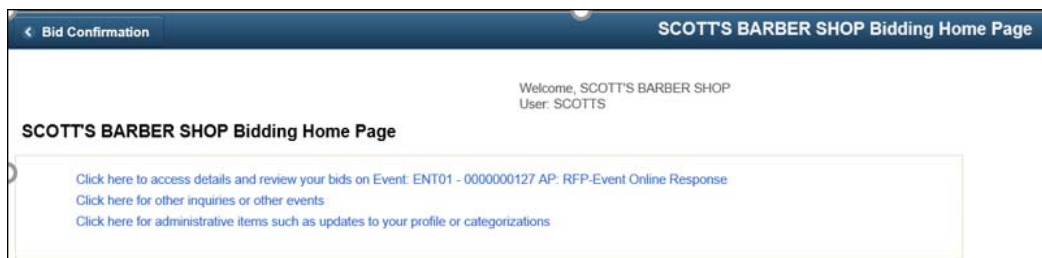
23

 Bid Confirmation page appears

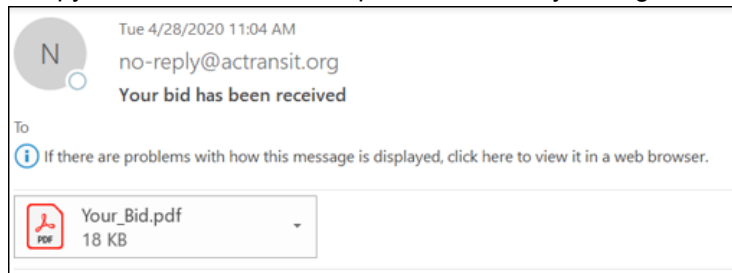
- Click OK



 Takes you back to the Bidding Home Page



- A softcopy of the entered Bid Response is sent to your registered Email address



End of Procedure.