

# Welcome to Sourcing for Buyers



- Instructor, Ramon Mira
- Welcome and Introductions
- Logistics
- Ground Rules
- Course Objectives
- Course Content



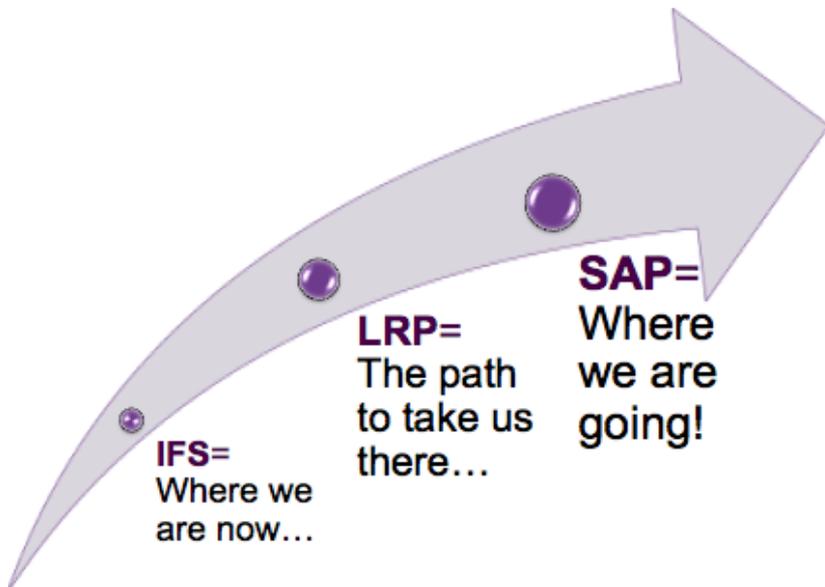
	<b>Chapter Description</b>	
<b>1</b>	<b>Course Overview</b>	
<b>2</b>	<b>Professional Shopping Cart</b>	
<b>3</b>	<b>Sourcing</b>	
<b>4</b>	<b>Managing the RFx Process</b>	
<b>5</b>	<b>Contract Management</b>	
<b>6</b>	<b>Summary</b>	

By the end of this course, you will be able to:

- Understand Buyer roles in the purchasing process
- Describe the Shopping Cart and its approval process
- View unprocessed Shopping Carts in the SRM Sourcing Cockpit
- Source for vendors
- Understand the RFx Process
- Create a contract or P.O. from an RFx response
- Manage contracts



The Legacy Replacement Program (LRP) is a business transformation project for Finance and Procurement



- Legacy refers to the District's outdated financial (includes procurement) system known as IFS
- The replacement program refers to the overall project to replace IFS with SAP (**S**ystems, **A**pplications, **P**roducts)
- SAP is an enterprise resource planning software which will become the financial and procurement system for the District

## What are the Key Benefits of SAP?

- Many processes become electronic:
  - Electronic invoicing
  - Use of online shopping cart
  - Most procurements conducted online
- Improvements to:
  - Inventory maintenance and asset management
  - Accessibility to real time reports with more comprehensive data
  - Volume buying discounts, generating cost savings
  - Productivity and efficiency of procurement and finance functions
- A single District financial system of record



## What is Procure to Pay?

- The Procure to Pay process represents the entire purchasing cycle, from the creation of a shopping cart to the payment of a vendor. This process includes determining requirements and requesting goods and services, sourcing, creating purchase orders, processing goods or services receipts, and processing invoices and payments.



- Supplier Relationship Management (SRM)
  - A user-friendly program which interfaces with SAP and allows schools and offices to use an online shopping cart to purchase goods and services from the District's warehouses and from external vendors.



# Purchasing Process Overview



- Requestor
  - Initiates the creation of the Shopping Cart (purchase requisition)
- Shopping Cart Approver
  - Approves the Shopping Cart request through workflow
- Strategic Buyer
  - Reviews shopping carts to determine requirements
  - Obtains quotes
  - Determines costs of requirements and sources of supply
  - Creates, maintains, and completes solicitations (RFxs, which are bid invitations)
  - Creates, maintains, and processes procurement documents (POs, contracts)



- Operational Buyer
  - Creates, maintains, and processes procurement documents (POs, contracts)
- RFx and Contract Approvers
  - Approve RFxs and contracts, as applicable, through workflow



- No longer a paper-based environment; majority of the work will be performed electronically
  - Automated Approval-routing (Workflow) for:
    - Shopping Carts
    - Purchase Orders
    - RFxs (solicitations) and
    - Contracts
  - Electronic form-creation & -maintenance
    - Bid-solicitation and responses
    - Purchase orders



- System-generated messages will include
  - Bid-invitations
  - Award notices
  - Contract-expiration & -capacity alerts
  - Approval action reminders (RFxs and contracts)
- Learning how to perform daily duties within a new system

- Many contract, amendment and RFx templates will be standardized and available within a single repository
- On-line certification will replace vendor signatures on some RFx responses



- Funding is already approved and pre-encumbered for shopping cart items
- Auto-creation of purchase orders for catalog items, other items under contract and low value purchases
- Workflow for Shopping Carts, P.O.'s, RFxs and Contracts
- Ability to attach documentation
- Access to real time data
  - Ability to track the progress of processes
  - Ability to generate own reports
- Reduced paperwork



	<b>Chapter Description</b>	
1	Course Overview	
2	<b>Professional Shopping Cart</b>	
3	<b>Sourcing</b>	
4	<b>Managing the RFx Process</b>	
5	<b>Contract Management</b>	
6	<b>Summary</b>	

By the end of this chapter, you will be able to:

- Discuss key terms and concepts
- Describe the types of Shopping Carts
- Describe the Shopping Cart creation process
- Describe Shopping Cart Approvals



- Shopping Cart
  - A feature used for shopping online to purchase goods and services from District warehouses and external vendors.
  - In most cases the quantity, vendor, required delivery date, estimated costs and other pertinent information is recorded in the shopping cart.
  - Purchase requisition
  
- Catalog through Open Catalog Interface (OCI)
  - Catalogs contain items that will result in automatically-  
Issued purchase orders
  
- Product Category / Material Group
  - A classification with a description that groups materials with similar attributes



- Product ID
  - A unique number used to specify an item with a Material Master
    - Referred to as a Material Number in ECC
- Purchasing Group
  - Identification given to purchasing department personnel involved in the procurement process
    - Purchasing Group = Buyer ID
- Workflow
  - Determines which persons are responsible for approving Shopping Carts, RFxs, contracts and purchase orders

- There are different ways of creating Shopping Carts:
  - Catalog – an online list of goods, by category, including descriptive information and pictures
    - **Internal catalog** for items ordered from:
      - District warehouses
      - General Stores Distribution Center Catalog
      - KIS Computer Center
    - **External catalog** for items ordered from outside vendors and for which contracts are already in place
      - Arey Jones
      - K12 Market Place
      - Follet Educational Resources
  - Non - Catalog (Free Text) - a Shopping Cart of an item that does not exist in any catalog. The Shopping Cart contains information that the Buyer needs to source the item such as descriptive information, pricing and referencing source.

## Low-value, Contract or Catalog Shopping Carts



- Select or look up item(s)
- Add the item(s) to the shopping cart
  - Specify quantity
  - Required date
  - Any additional items
- Review and submit cart
- Funds are automatically checked and the workflow is initiated sending the shopping cart for approval and fulfillment

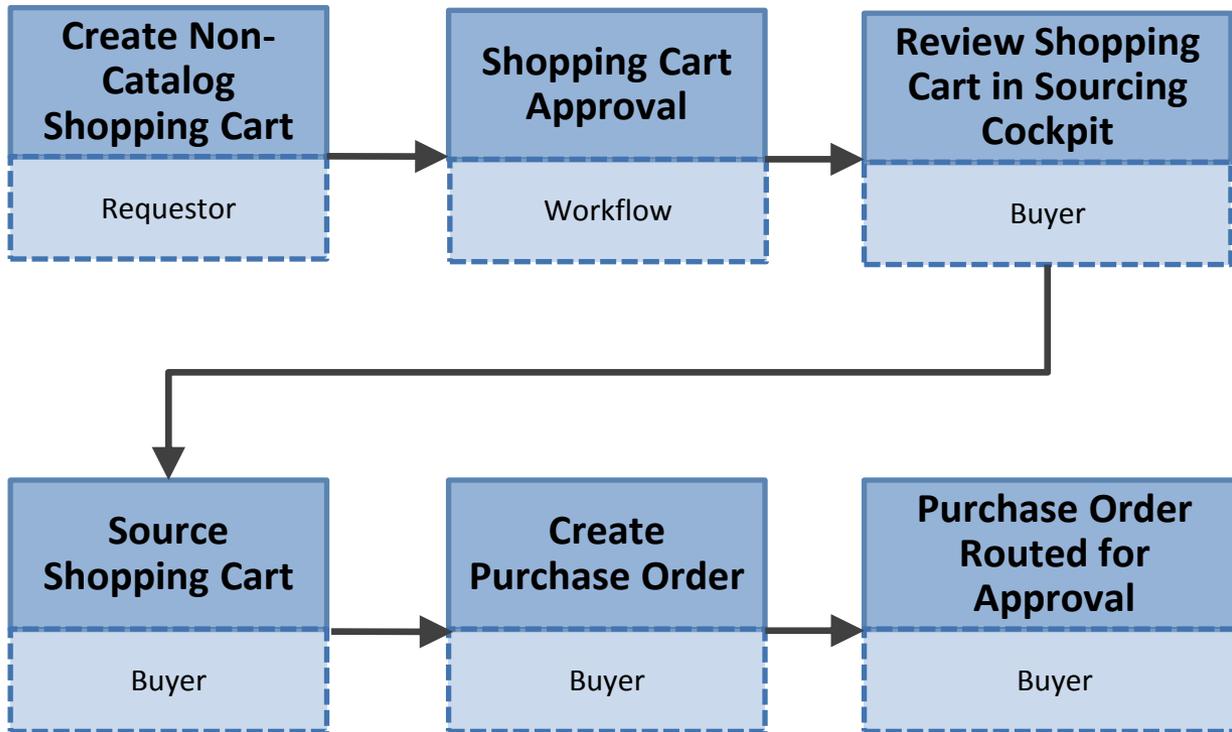


Create a Catalog Shopping Cart



*This is a  
demonstration only.  
Watch as the  
instructor shows you  
how to complete the  
task in SAP.*

# Non-Catalog Shopping Cart Creation Purchases > \$25,000



- Enter descriptive information, pricing and referencing source for item(s)
- Add the item(s) to the shopping cart
  - Specify quantity
  - Required date
  - Any additional items
- Review and submit cart
- Funds are automatically checked. Workflow initiates sending the shopping cart for approval, sourcing and fulfillment.



Create a Non-Catalog (Free Text) Shopping Cart



*This is a  
demonstration only.  
Watch as the  
instructor shows you  
how to complete the  
task in SAP.*

- Shopping Carts may have one or more levels of approval:
  - First approval – Requestor's Cost Center Manager
- Key Note: By the time a Shopping Cart arrives in the Sourcing Cockpit, the funds have already been pre-encumbered.



- The product category/material group drives the Shopping Cart to the right Buyer
  - Reassign if necessary
- Documents can be attached to the shopping cart
  - Documents will carry to the purchase order



	Chapter Description	
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3	<b>Sourcing</b>	
4	Managing RFx Process	
5	Contract Management	
6	Summary	

By the end of this chapter, you will be able to:

- Discuss key terms and concepts
- Review shopping cart requests in sourcing cockpit
- Create a P.O. from a Shopping Cart
- Create an RFx from a Shopping Cart



## ■ Sourcing

- The process of selecting and committing a supplier to provide a good or service required by the District

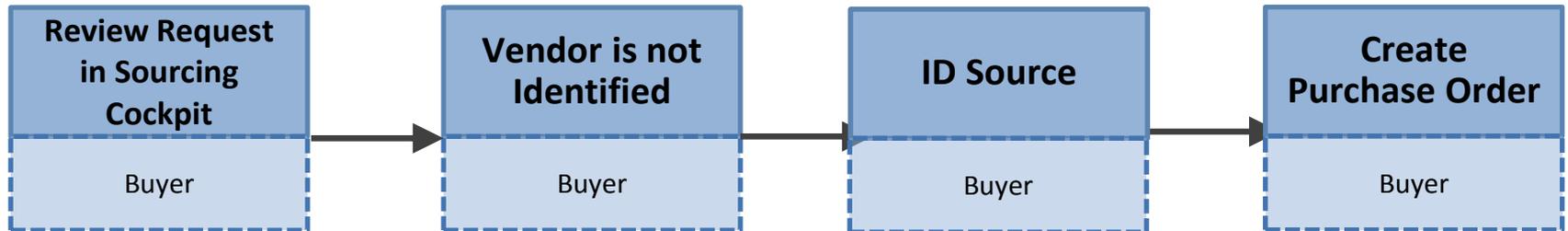
## ■ Sourcing Cockpit

- The part of the Buyer's work area in SRM from which the Buyer conducts the sourcing process
- Sourcing Cockpit can be used to:
  - View unassigned shopping carts
  - Assign vendors to shopping carts
  - Create solicitation documents
  - Create purchase orders
  - Create contracts

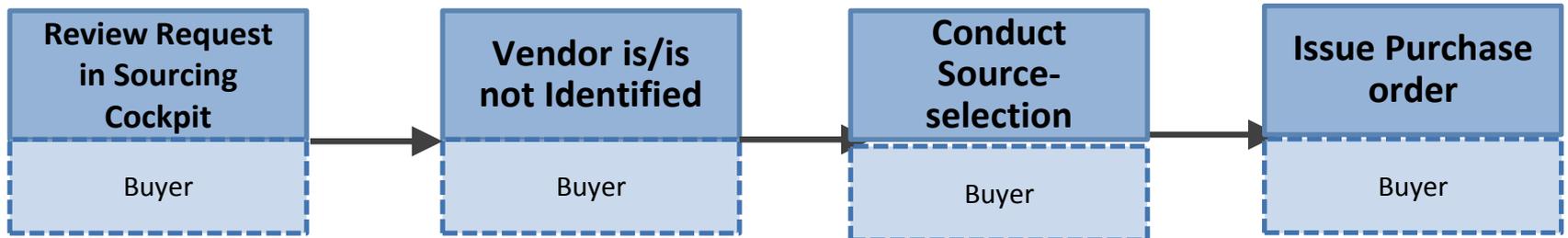


- Identification of Need
  - Shopping Cart is for goods and services not under contract
  - Buyer's own analysis indicates that a contract is nearing its expiration or its target value
  
- Develop and Issue RFx
  - Create RFx
  - Create and attach supporting documentation
  - Publish (to approvers, where required)
  - See information regarding Formal and Technical RFxs posted on the Procurement website

## Source Product - Less Than the Low-value Threshold [\$25,000]



## Source Product - Greater Than the Low-value Threshold [\$25,000]



Welcome BUYER05, [Help](#) | [Log off](#) 

[Home](#) | [Procurement / Contracts](#)

Process Transactions

Sourcing [History](#) | [Back](#) | [Forward](#)

## Assign Sources of Supply

1 Select Requisition | 2 Assign Sources of Supply (No Items) | 3 Review Drafts (No Items) | 4 Summary Screen (No Documents)

[Previous](#) | [Next](#) | [System Info](#) | [Create Memory Snapshot](#)

▼ Search Criteria: Requisitions

Number of Requisition:  Name of Requisition:

Item Description:  Product Category:

Product:  Supplier:

Requester:  External Requirement:

Purchasing Organization:  Account Assignment Category:

Purchasing Group:  Account Assignment Number:

Priority:  Intended for Grouping:

Delivery Date Range:  Include Locked Items:

Delivery Date:  To:

[Search](#) [Settings](#)

**Enter Search Criteria**

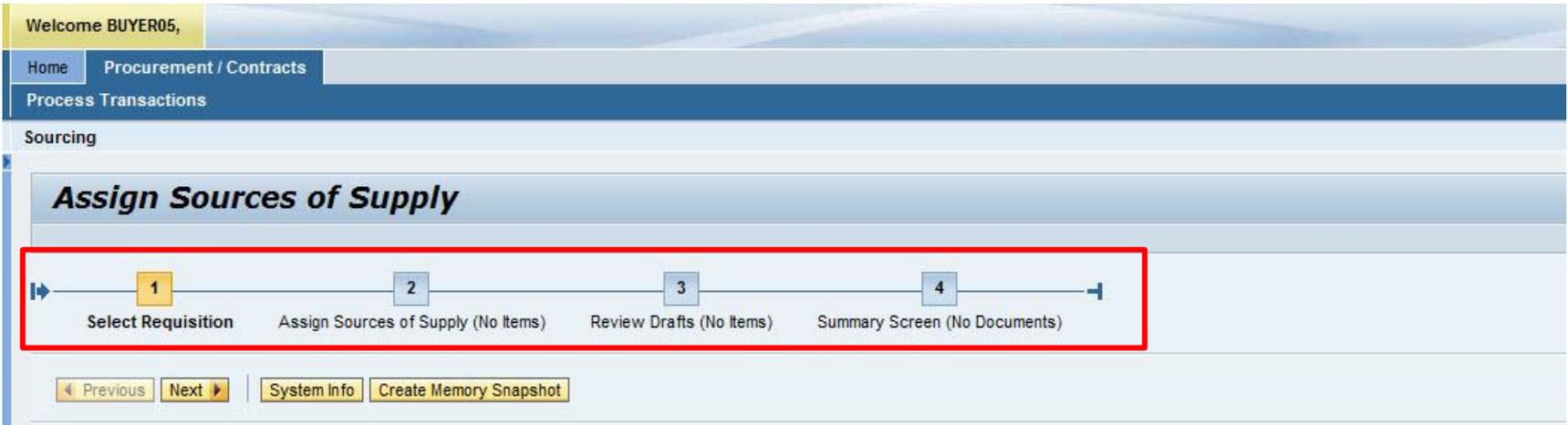
Search Results

[Select All](#) | [Expand](#) | [Collapse](#) | [Hide Subordinate Outlines](#) |  | [Reject Items](#)

Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name	Contract	Info Record	Manufacturer Part Number	Manufacturer
1000001273/1	PROFESSIONAL DEVELOPMENT AND TRAINER SER	96258		2	EA	Blanca Torres	03/14/2013						

**Shopping Carts displayed here**

[Previous](#) | [Next](#) | [System Info](#) | [Create Memory Snapshot](#)



The screenshot displays the Sourcing Cockpit interface. At the top, it says "Welcome BUYER05,". Below that, there are navigation tabs for "Home" and "Procurement / Contracts". The main section is titled "Process Transactions" and "Sourcing". The central part of the interface is titled "Assign Sources of Supply" and features a process flow diagram with four steps: 1. Select Requisition, 2. Assign Sources of Supply (No Items), 3. Review Drafts (No Items), and 4. Summary Screen (No Documents). The first step is highlighted with a red box. Below the flow diagram, there are buttons for "Previous", "Next", "System Info", and "Create Memory Snapshot".

- The Sourcing Cockpit outlines and displays the Sourcing process:
  - Select Requisition (shopping cart)
  - Assign Source of Supply
  - Review Drafts
  - Summary Screen

▼ Search Criteria: Requisitions

Number of Requisition:	<input type="text" value="1000001273"/>	Name of Requisition:	<input type="text"/>	<a href="#">Settings</a>
Item Description:	<input type="text"/>	Product Category:	<input type="text"/>	
Product:	<input type="text"/>	Supplier:	<input type="text"/>	
Requester:	<input type="text"/>	External Requirement:	<input type="text"/>	
Purchasing Organization:	<input type="text"/>	Account Assignment Category:	<input type="text"/>	
Purchasing Group:	<input type="text"/>	Account Assignment Number:	<input type="text"/>	
Priority:	<input type="text"/>	Intended for Grouping:	<input type="checkbox"/>	
Delivery Date Range:	<input type="text"/>	Include Locked Items:	<input type="checkbox"/>	
Delivery Date:	<input type="text"/> To: <input type="text"/>			

## ■ Search Criteria

- Allows you to narrow the results of Shopping Carts displayed
- Allows you to set up your settings to display your personalized information the next time you log in.

Search Results

Select All Expand Collapse Hide Subordinate Outlines All Categories Reject Items

Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name	Contract	Info Record	Manufacturer Part Number	Manufacturer
• <a href="#">1000001273/1</a>	PROFESSIONAL DEVELOPMENT AND TRAINER SER	96258		2	EA	Blanca Torres	03/14/2013						
<b>Shopping Carts displayed here</b>													

Previous Next System Info Create Memory Snapshot

## ■ Search Results

- Based on the information entered for the Search Criteria, this area displays all applicable Shopping Cart (requisition) requests

Review Shopping Cart Request in Sourcing Cockpit



*This is a  
demonstration only.  
Watch as the  
instructor shows you  
how to complete the  
task in SAP.*

Review Shopping Cart Request in Sourcing Cockpit



*To complete this  
exercise  
follow the  
instructions listed  
here.*

- Purchase orders can be created three ways:
  - Auto-created from shopping cart
    - If under the threshold amount
    - All required fields are completed (vendor, amount, etc.)
  - Sourcing Cockpit
    - Over the threshold amount
    - Required fields were omitted
    - No current contract
  - Directly within SAP



Create PO from Shopping Cart

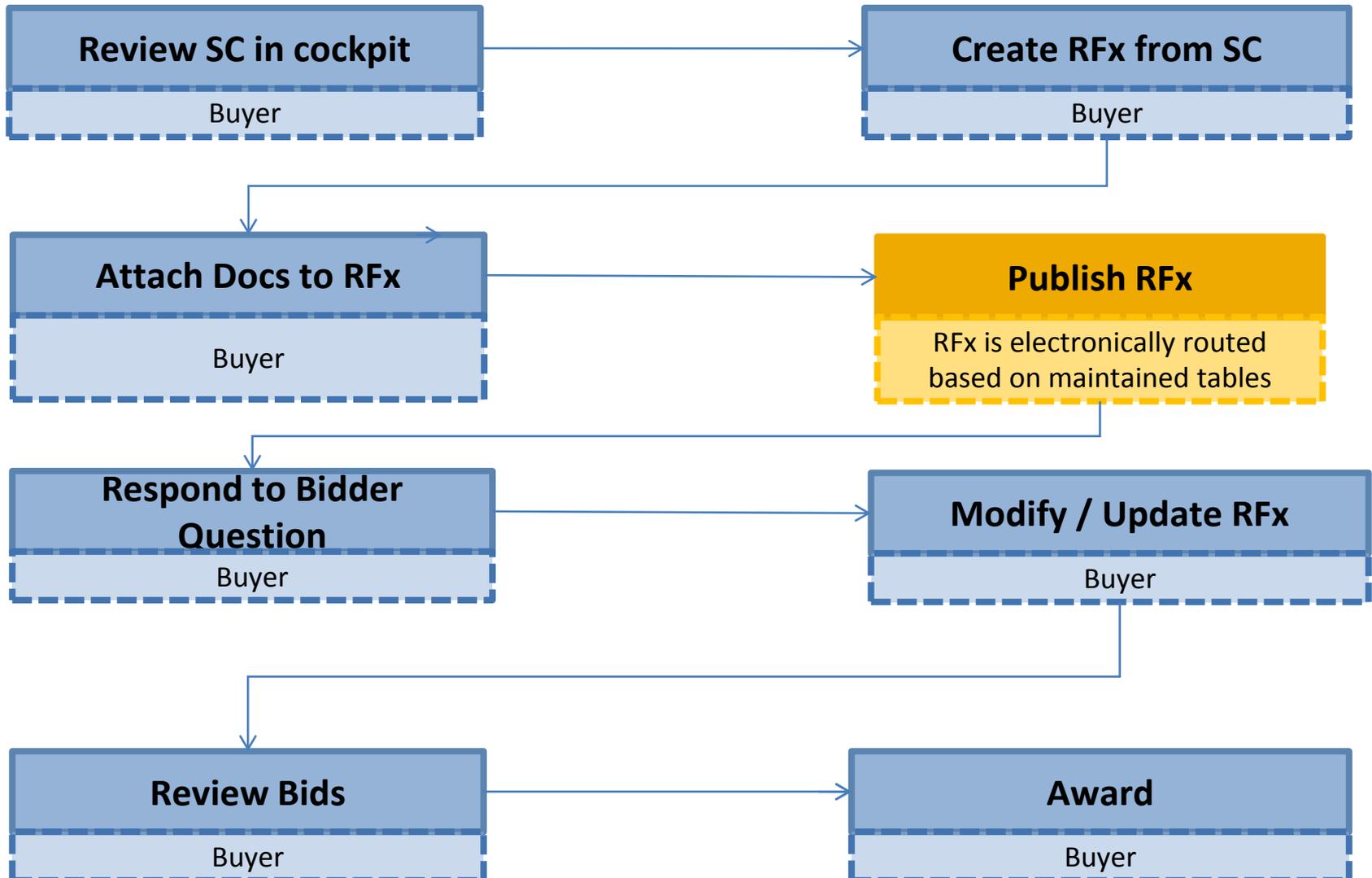


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demonstration only.  
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how to complete the  
task in SAP.*

Create PO from Shopping Cart



*To complete this  
exercise  
follow the  
instructions listed  
here.*



- RFx - can be created several ways:
  - Sourcing Cockpit (from Shopping Cart)
    - Informal RFx
    - Formal RFx
    - Technical RFx
    - Reverse Auction (alone or as part of RFx)
  - Copy an existing RFx
  - Directly in SAP



Create RFx from Shopping Cart

Scenario: Add Questions that can be weighted for bid evaluation



*This is a  
demonstration only.  
Watch as the  
instructor shows you  
how to complete the  
task in SAP.*

Create RFx from Shopping Cart



*To complete this  
exercise  
follow the  
instructions listed  
here.*

- RFx Status:
  - Saved -
  - Awaiting Approval -
  - Published -
  - Completed -
  - Deleted -
  - Release Rejected -



- One of the benefits of the SRM is the ability to attach documents to RFxs, RFX Responses and other records.
- This supporting documentation is available for easy retrieval.
- Documents can be added during the initial creation of a RFX or later as needed through
  - Notes and Attachments tab or
  - Collaboration Folder



Attach Documents to RFx



*This is a  
demonstration only.  
Watch as the  
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task in SAP.*

Attach Documents to RFx



*To complete this  
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follow the  
instructions listed  
here.*

- Document Builder is a tool for creating the paper documents associated with a record—an Invitation for Bid document, for example, for an RFx record.
- Document Builder pulls some information from SRM (RFx submission deadline, for instance) and some information from the user's responses to certain template-specific questions.
- At go-live, we expect 13 RFx and contract documents to be accessible through Document Builder with more to come.



**Display Document: 2000000851**

RFx Number: 2000000851    Smart Number: DOC. B. TEST    Type: Informal RFx    Status: Saved    Created On: 06/18/2013 18:45:00    Created By: Anna Santos    Time Zone: PST    Number of Suppliers: 0  
 Number of Items: 0    Version Type: Active Version

Enter at least one partner of type Portal Provider Or Bidder

Edit Close Refresh Copy Check Export Print Preview System Information Create Memory Snapshot

Related Links

- Supplier Evaluation
- Tender Fee Payment Details
- EMD Payment Details
- Create Bidder
- Document Builder**

RFx Information Bidders Items Notes and Attachments Weights and Scores Approval Tracking

RFx Parameters Questions Notes and Attachments Table Extension Payment Synopsis User-Specified Status

**Identification**

RFx Name:

RFx Type:

Product Category:

Publication Type:

**Organization**

Purchasing Organization:

Purchasing Group:  Show Members

**Event Parameters**

Currency:

Target Value:  USD

Detailed Price Information:

Follow-On Document:

Bidder Can Change RFx Responses:

Allow Multiple RFx Responses for Each Company:

Display Weighting to Bidders:

**Dates**

Start Date:

Submission Deadline:

Opening Date:

**Document Builder**

Groups	Contract Types
<input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Finish with Defaults"/>	
<b>Document Data Groups</b>	
<ul style="list-style-type: none"> <li> <input checked="" type="checkbox"/> Doc Data Structure           <ul style="list-style-type: none"> <li> <input checked="" type="checkbox"/> LAUSD Local Fill-In Variables Non-Mapped             </li> <li style="background-color: #FFD700;"> <input checked="" type="checkbox"/> Contract Types             </li> </ul> </li> </ul>	<input checked="" type="checkbox"/> Determine if Invitation for Bids document is to be created #10: <hr/> <input type="checkbox"/> Determine if Notice of Acceptance of Bid and Award of Contract document is to be created #13: <hr/> <input type="checkbox"/> Determine if Request for Quotation is to be created #20: <hr/> <input type="checkbox"/> Determine if Request for Proposal Standard will be created #15: <hr/> <input type="checkbox"/> Determine if Agreement for Professional Services is to be created #24: <hr/> <input type="checkbox"/> Determine if IFB Rate Schedule is to be created #11: <hr/> <input type="checkbox"/> Determine if Addendum to IFB is to be created #12: <hr/> <input type="checkbox"/> Determine if Amendment to Contract for Goods and Services document is to be created #14: <hr/> <input type="checkbox"/> Determine if PSA Document is to be Created: <hr/> <input type="checkbox"/> Determine if MPSA Document is to be Created: <hr/> <input type="checkbox"/> Add Test Variables Element to Document?: <hr/>

Document Builder

Header Data | **Dialog** | Document Summary | Preview | Attachments

**Groups**

Previous | Next | Finish with Defaults

**Document Data Groups**

- ✓ Doc Data Structure
- ✓ LAUSD Local Fill-In Variables Non-Mapped
- ✓ Contract Types

**LAUSD Local Fill-In Variables Non-Mapped**

What is the city address of the District representative to whom vendor invoices are to be sent?:

---

What is the name of the department or school of the District representative to whom vendor invoices are to be sent?:

---

What is the zip code of the District representative to whom vendor invoices are to be sent?:

---

What is state address of the District representative to whom vendor invoices are to be sent?:

---

First date on which the RFx was advertised, if it was advertised::  

---

Date of any pre-submission conference::  

---

Start time of any pre-submission conference::

---

What is the anticipated effective date of any contract that results from this RFx or of the selected vendor's performance if no contract will issue?:  

---

What is the last date on which bidders can submit questions regarding this RFX?:  

Document Data | User Workspace

Document Builder

Edit Copy Save Save as User Template Release Cancel Refresh Log Off

Header Data Dialog Document Summary Preview Attachments

Document Summary

Document Sections 

- ▼ Sections
  - Cover
  - Table of Contents
  - Section 1
  - Section 2
  - Section 3
  - Section 4
  - Section 5
  - Section 6
  - Section 7
  - Section 8

Element Summary

View: [Standard View] | Export Create Edit Insert Cut Paste Delete Utilities

	Position	Section	Element	Effective Date	Version	Regulation Set	Property	Description	Editable	Ir
	1	Z0COV	Z_COV_IFB	05/02/2013	1	ZGEN	Full Text	Cover for IFB		
	2	Z0TOC	Z_TOC_BASIC	12/05/2012	1			Table of Contents		
	3	Z1	Z_RFX_ALL_IFB	05/02/2013	1	ZGEN	Full Text	Invitation for Bids		
	4	Z2	Z_RFX_ALL_IFBS	05/06/2013	1	ZGEN	Full Text	IFB Rate Schedule		



**WARNING!**  
BID PACKAGE MUST BE  
RETURNED IN ITS ENTIRETY

**LOS ANGELES UNIFIED SCHOOL DISTRICT**  
Procurement Services Center – Procurement Administration  
8525 Rex Road  
Pico Rivera, CA 90660  
(562) 654-9311

INVITATION FOR BID  
(IFB)/RFX

IFB/RFX FOR: DOC. B. TEST

IFB/RFX NO. 2000000851

DATE ISSUED: 06/18/2013

DATE ADVERTISED: 06/06/2013

PRE-SUBMISSION CONFERENCE: 06/25/2013

SUBMITTAL DATE: 06/28/2013

ANTICIPATED CONTRACT START DATE: 08/01/2013

LAST DAY FOR QUESTIONS: 06/14/2013

BIDDER'S (FIRM) NAME: \_\_\_\_\_

Note: All bidders are required to attach a completed bid document to their RFX Response record.

## Table of Contents

IFB LETTER TO BIDDERS.....	10
“NO-BID” RESPONSE FORM.....	14
SECTION I.....	16
BID FORM AND RATE SCHEDULE INSTRUCTIONS.....	16
1. SCOPE OF CONTRACT.....	16
2. TERM OF UNIT RATE REQUIREMENTS CONTRACT.....	16
3. AWARD OF CONTRACT.....	16
4. BASIS OF AWARD.....	17
5. ADJUSTMENT TO THE RATE (UNIT PRICE) SCHEDULE.....	18
6. INVOICES AND PAYMENTS.....	19
7. *PROCUREMENT CARD PURCHASES (P-CARD).....	19
8. TAXES.....	20
9. AUTHORIZED DISTRICT REPRESENTATIVE.....	20
10. RATE SCHEDULE.....	20
11. ESTIMATED DISTRICT REQUIREMENTS.....	21
12. ORDER OF PRECEDENCE – SEALED BIDDING.....	21
13. NOTICES, DEMANDS AND COMMUNICATIONS.....	21
14. INDEPENDENCE OF BID.....	22
15. CONTRACT PIGGYBACK PROVISION.....	22
16. NAME AND NATURE OF BIDDER’S LEGAL ENTITY.....	22
17. CONTRACT AWARD NOTIFICATION.....	25
18. FILING OF PROTESTS.....	26
SECTION II.....	27
SPECIFIC BID CONDITIONS/CERTIFICATIONS.....	27
1. COMPLIANCE WITH LAUSD ETHICS AND INTEGRITY STANDARDS.....	27
2. SWEAT-FREE PROCUREMENT POLICY CERTIFICATION.....	36
3. CONFLICT OF INTEREST DISCLOSURE FORM.....	38
4. CERTIFICATION REGARDING DEBARMENT.....	42
SECTION III.....	43

- The RFx document has been completed in Document Builder and with the RFx record will be electronically routed via workflow for review and approval.
  - Authorized approvers were previously identified within SRM through maintained tables
  - Additional approvers may be added on an “ad hoc” basis



Publish RFx for Approval



*This is a  
demonstration only.  
Watch as the  
instructor shows you  
how to complete the  
task in SAP.*

Publish RFX for Approval



*To complete this  
exercise  
follow the  
instructions listed  
here.*

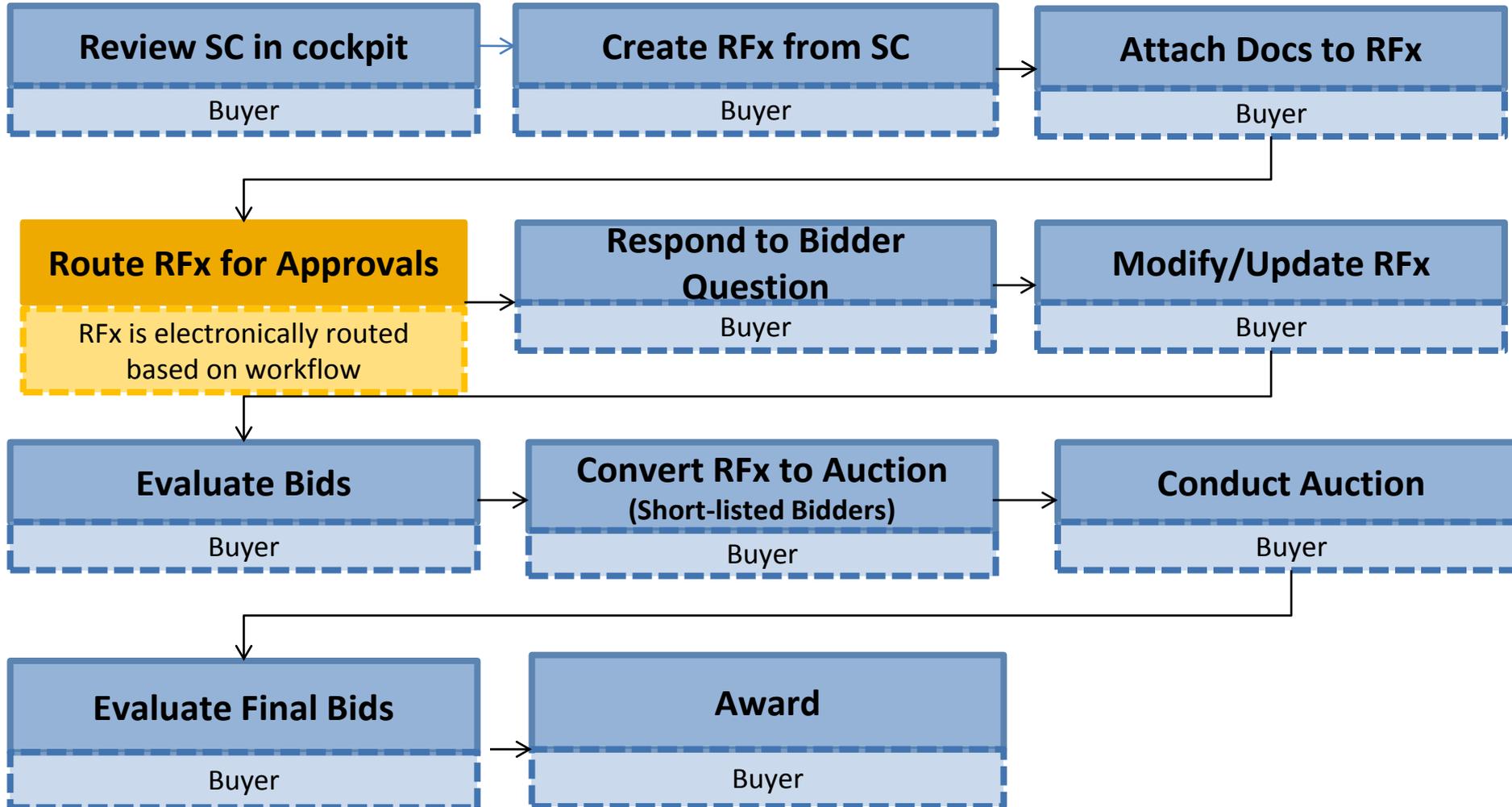
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By the end of this chapter, you will be able to:

- Discuss key terms and concepts
- Respond to bidder questions
- Modify/ Update RFx
- Convert an RFx into an auction
- Evaluate RFx responses in SRM



# RFX WITH AUCTION PROCESS FLOW



- Bidding Engine is a component of SRM that can be used by Buyers to:
  - Create and process bid invitations and live auctions
  - Respond to Bidder question(s)
  - Evaluate bids
- Supplier Self-Service (SUS) is a web-based application that gives Bidders access to doing business with the District over the Internet directly.
  - Allows Bidders to register and maintain their own data for accuracy
  - Used to submit bids in response to bid invitations and auctions



- Supplier Self-Service (SUS) and Bidding Engine
  - Integration between the two allows the Buyer, to publish a bid invitation initiated in the Bidding Engine via SUS. Bidders can then use this service as a single point of access for all interactions with the Buyer.
  - Creates a streamlined and highly collaborative bid management experience
  - Enables staff to review each bid response



Bid Processing - SAP NetWeaver Portal - Windows Internet Explorer

https://supplyportal-qa.lausd.net/irj/portal

File Edit View Favorites Tools Help

★ Favorites ★ Help Desk SAP NetWeaver Portal Manage RFx - SAP NetWe... IT HelpDesk Suggested Sites Web Slice Gallery

Bid Processing - SAP NetWeaver Portal

Welcome Will Henry [Log off](#) 

Administration RFx and Auctions Supplier Collaboration

Overview

Bid Processing [History](#) [BackForward](#)

**Active Queries**

eRFxs [All \(155\)](#) [Published \(0\)](#) [Ended \(0\)](#) [Completed \(0\)](#)

eAuctions [All \(1\)](#) [Published \(1\)](#) [Ended \(17\)](#) [Completed \(1\)](#)

eRFxs - All [Change Query](#) [Define New Query](#) [Personalize](#)

▼ Hide Quick Criteria Maintenance

Event Number:  To

Event Status:

My Responses From:

Smart Number:

[Apply](#) [Clear](#)

View:  [Create Response](#) [Display Event](#) [Display Response](#) [Print Preview](#) [Refresh](#) [Export](#) [Filter Settings](#)

Event Number	Event Description	Event Type	Event Status	Start Date	End Date	Response Number	Response Status	Event Version	Response Version	Q&A
<a href="#">200000850</a>	NOIA TEST IV	Informal RFx	Published		06/18/2013		No Bid Created			0
<a href="#">200000843</a>	NOIA Test II	Informal RFx	Published		06/17/2013	<a href="#">300000669</a>	Rejected			0
<a href="#">200000841</a>	(Copy of 200000813)	Formal RFx	Published		06/15/2013	<a href="#">300000667</a>	Submitted			0
<a href="#">200000840</a>	Opening Time Test	Informal RFx	Published		06/14/2013	<a href="#">300000663</a>	Submitted			0
<a href="#">200000828</a>	George's RFx	Informal RFx	Published		06/14/2013	<a href="#">300000677</a>	Rejected			0

Done Internet | Protected Mode: On 125% 8:54 PM 6/18/2013

- Formal and Informal RFxs Distinguished by Policy
- Formal RFx- RFXP
  - Public or Private
  - Over State bidding threshold
  - Two levels of approval required (over buyer)
- Informal RFx- RFXI
  - Private
  - Bidders' list of Vendors identified
  - One level of approval

### *Select RFx Type*

Select the type of RFx you want to create

	RFx Type	RFx Type Description
<input type="checkbox"/>	RFXF	Technical
<input checked="" type="checkbox"/>	RFXI	Informal RFx
<input type="checkbox"/>	RFXP	Formal RFx
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

- Technical /RFx-RFXF
  - Two envelope
    - Technical qualifications evaluated first
    - Price and related criteria evaluated second
  - Two separate openings
    - Technical
    - Price
  - Managed through collaboration folders

### Select RFx Type

Select the type of RFx you want to cr

	RFx Type	RFx Type Description
<input type="checkbox"/>	RFXF	Technical
<input type="checkbox"/>	RFXI	Informal RFx
<input type="checkbox"/>	RFXP	Formal RFx
<input type="checkbox"/>		
<input type="checkbox"/>		

Create RFX - SAP NetWeaver Portal - Windows Internet Explorer

https://bts-qa1.lausd.net/irj/portal?NavigationTarget=ROLES%3A%2F%2Fportal\_content%2Fnet.lausd.lrp.fld.LAUSD%2Fnet.lausd.lrp.fld.roles%2FProcurement%2FSRM%2Fnet.lausd.lrp.role.rfxevaluatorcreate%2Fnet.lausd.lrp.role.rfxevaluator%2Foverview%2Fnet.lausd.lrp.workset.managerfxcre

Create RFX | History BackForward

---

## Create RFX Help

RFX Number 2000000860    Smart Number BUYER04 06/18/2013 21:03    **Type Formal RFX**    Status In Process    Created On 06/18/2013 21:03:34    Created By Lane Morikami    Time Zone PST  
 Number of Suppliers 0    Number of Items 0    Version Type Active Version

Close   Publish   Save   Check   Export   Print Preview   Import   System Information   Create Memory Snapshot   Create RFX

---

RFX Information   Bidders   Items   Notes and Attachments   Weights and Scores   Approval   Tracking

RFX Parameters   Questions   Notes and Attachments   Table Extension   Payment   Synopsis   User-Specified Status

---

**Identification**

RFX Name:

RFX Type:

Product Category:

Publication Type:

**Organization**

Purchasing Organization:

Purchasing Group:  Show Members

**Dates**

Start Date:

Submission Deadline: \*

Opening Date:

End of Binding Period:

Valid From / To:  -

**Event Parameters**

Currency:

Target Value:  USD

Detailed Price Information:

Follow-On Document:

Bidder Can Change RFX Responses:

Allow Multiple RFX Responses for Each Company:

Display Weighting to Bidders:

Done Internet | Protected Mode: On    125%    9:05 PM 6/18/2013

- If Bidders have additional questions regarding the RFx, they are able to ask the buyer questions



Respond to Questions



*This is a  
demonstration only.  
Watch as the  
instructor shows you  
how to complete the  
task in SAP.*

Respond to Questions



*To complete this  
exercise  
follow the  
instructions listed  
here.*

- Based on the questions from the Bidder it may be necessary to update the existing RFx.
  - Extend the bid submission deadline
  - Modify other aspects



Modify/Update RFx



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demonstration only.  
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Modify/Update RFx



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- Receipt and Evaluation of Bids
  - Respond to Bidders' questions
  - Modify RFx (if applicable)
  - Evaluate RFx Responses
    - Determine if any follow-on procurement actions are appropriate (e.g., reverse auction, follow-on RFx)
    - If so, Buyer can convert RFx to an auction or conduct follow-on RFx
- Award
  - Notice of bid status
  - Notice of Non-award
- Contract, where appropriate
- Purchase Order



- Receipt of Bids and Enter Evaluator Scores
  - Bids will be received, reviewed and evaluated by Buyers
  - Evaluated bids may be issued scores manually or through SRM



Review Bid Proposals



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task in SAP.*

## Review Bid Proposals



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- Reverse Auction (live auction)
  - Allows bidders to interactively adjust their bids in reaction to bids submitted by other bidders
    - Think eBay!



Convert an RFx into a Reverse Auction  
w/Short Listed Bidders

Scenario: Show both the Buyer's view and the  
Bidder's View



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task in SAP.*

Create Reverse Auctions w/Short Listed Bidders



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here.*

- Bid-status Notice
  - System Generated when buyer clicks *Award* after accepting and rejecting RFX responses (or after accepting and rejecting auction responses)
- Award
  - After a proposed award has been approved by Board of Education or otherwise:
    - Buyer manually sends notice to awarded party
      - May also send notice to non-awarded bidders
    - Buyer runs ZSR\_RFX\_TO\_WEBSITE Transaction
      - This transaction posts award details to procurement website

	Chapter Description	Time
1	Course Overview	
2	Professional Shopping Cart	
3	Sourcing	
4	Managing the RFx Process	
5	<b>Contract Management</b>	
6	Summary	

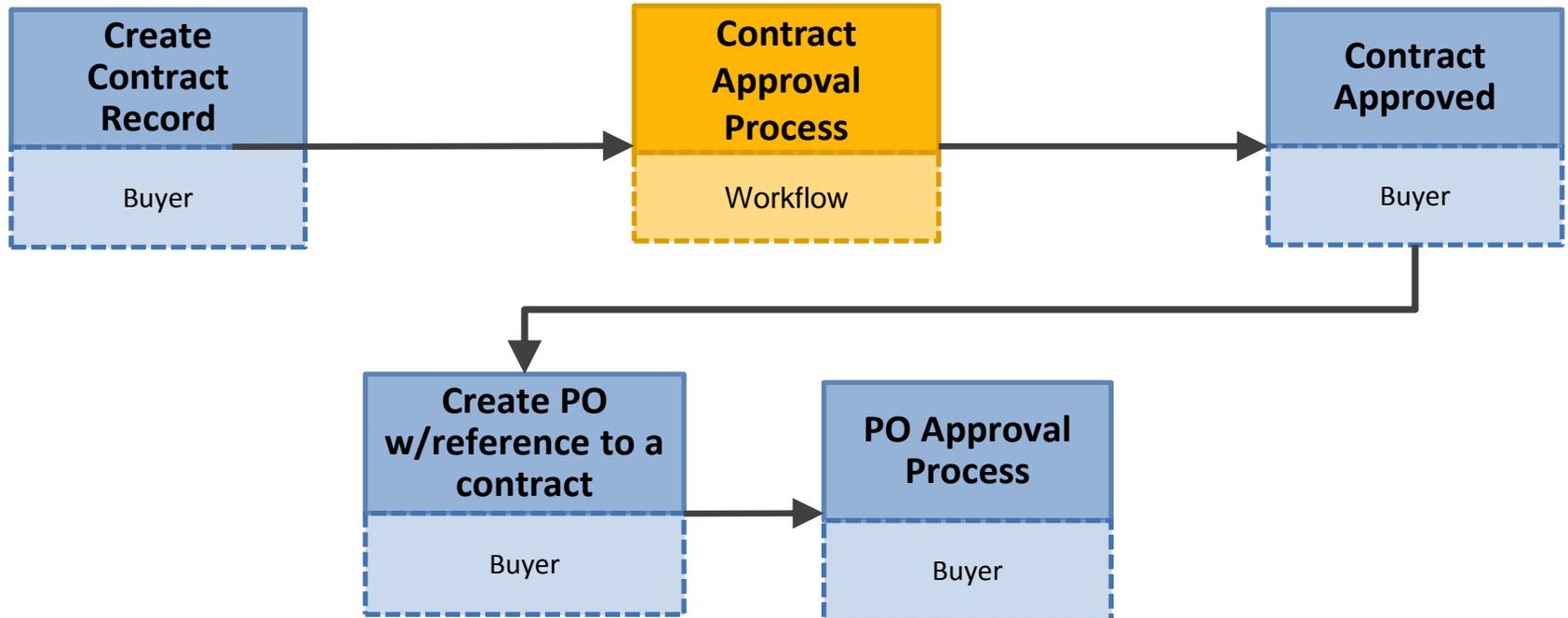
By the end of this chapter, you will be able to:

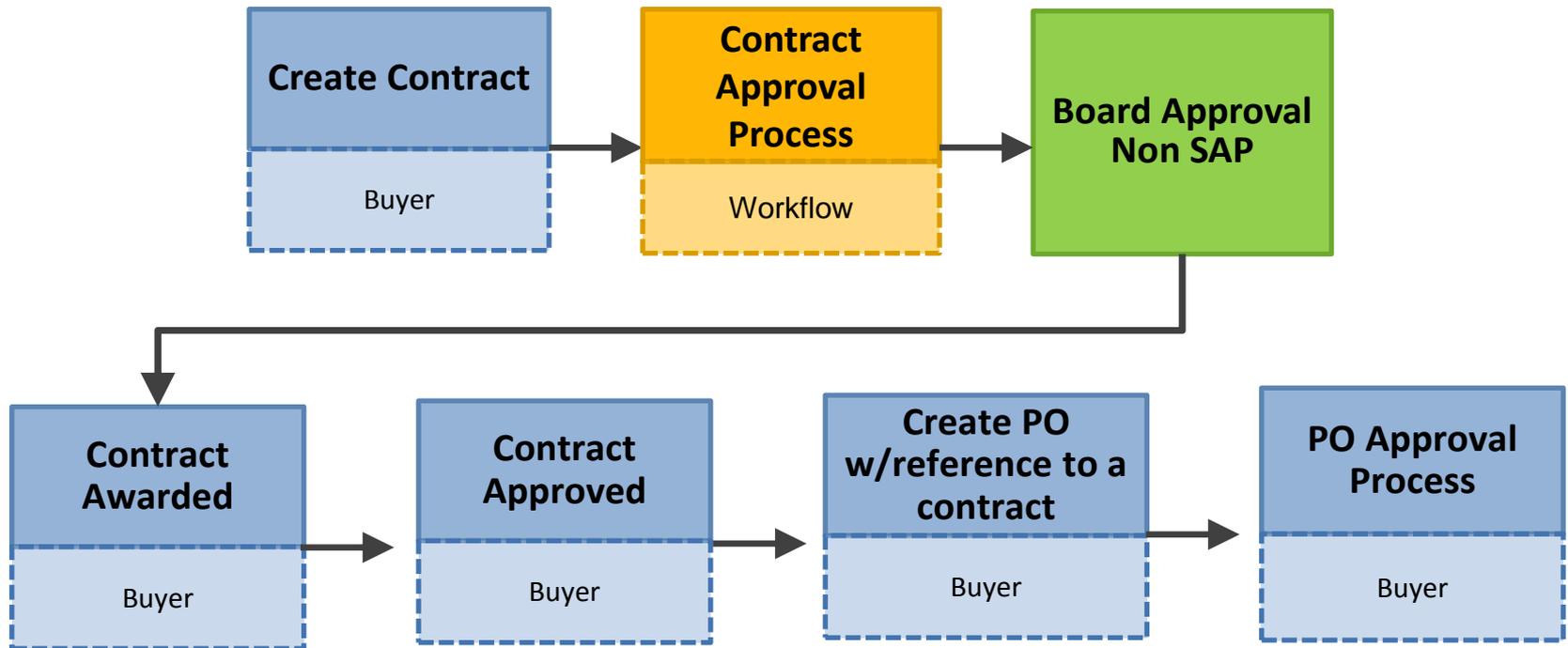
- Discuss key terms and concepts
- Monitor Contracts and available amount
- Forward Contract for Approval
- Reference Contract in a Purchase Order



- Manage Contracts activity will be used to create, approve, amend, renegotiate and complete District procurement contracts either as a result of (or independent of) a solicitation process, as required.
  - Create Contract – contract record created initiating workflow
  - Approve Contract - completed through workflow
  - Display Contract – view contract record
  - Amend Contract - contract changes will follow original process flow







- As a Buyer, you will have to monitor two items for contracts:
  - Effective Term - validity period of a contract; valid to and valid from
  - Target Value - existing contract's monetary capacity; not to exceed amount
  - Automated alerts:
    - Expiration Date
    - Target Value



- A Buyer will learn of the need to create or enter into an agreement from three key sources:
  - Shopping Cart
  - Buyer's own monitoring of agreements
  - Offline procurement process for Facilities



- A Buyer will develop a contract after:
  - Recognizing a need
  - Verifying no violation of District policy



- A Buyer will
  - Verify funding
  - Submit the proposed agreement for approval(s) –
    - in SAP through
      - Established workflow and/or
      - Ad hoc approvers or
    - Offline
  - Confirm District policy requirements - Was Board pre-approval needed?
    - Below Board-approval threshold, electronically route via SRM for final review and approval
    - Above threshold, manually prepare and submit for Board consideration

- Buyer submits contract document to vendor for signature offline
- Buyer will submit the contract offline for District signature
- Once signed, the contract can be sent to the vendor and uploaded into SAP and released
- Releasing the contract makes it available for use



Forward Contract for Approval



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task in SAP.*

Forward Contract for Approval



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	<b>Chapter Description</b>	<b>Time</b>
1	Course Overview	
2	Professional Shopping Cart	
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5	Contract Management	
6	<b>Summary</b>	

At the completion of this course, we've learned:

- The value of a Professional Shopping Cart
- How to create, maintain, and complete procurement processes (RFxs and auctions)
- How to create, maintain, and process contracts
- The SRM system allows for flexibility in terms of when changes can be made to a contract record.

**What have  
you  
learned so  
far?**

**Do you have  
any  
questions?**



**You have just completed Sourcing for Buyers.**

**Thank you for attending!**

