Exercise Guide

Course Name: Reverse Auctions Buyer's Training Guide
Exercise Guide

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Unit 1 – Complete and Publish RFx: <u>Agency Buyer</u>

Enter URL: **https://ugq.magic.ms.gov/irj/portal**

Enter: **User ID** and **Password** provided by instructor

Click **Logon**

Click **Procurement** tab

Click on **Strategic Sourcing** icon

Exercise 1.1 – Complete RFx

Scenario Objectives: The agency has already created an RFx. The Agency Buyer will now complete the Start Dates and Publish the RFx.

Required Data

Task	Additional Information
Initial Screen	**Strategic Sourcing POWL**
1. Click **All (2)** search query on RFx active query list	
2. Enter **RFx Number**	An RFx number will be provided by the Instructor.
3. Click **Apply**	
4. Click the **RFx number**	The RFx will open in another screen.
5. Click **Edit**	

6. Complete the following:
    Start Date
    Bid Submission End Date
    Opening Date
	Review your dates: Use current date. Use current time plus 10 minutes.

7. Click **Check**	Correct any errors
8. Click **Publish**	Once the bid is published, bidders will be able submit responses until the Bid Submission End Date

|	
9. Click Refresh icon ⟳	

Unit 2 – Reverse Auction Setup:
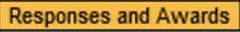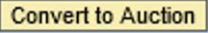
Click **Procurement** tab

Click on **Strategic Sourcing** icon

Exercise 2.1 – Convert RFx to Auction

Scenario Objectives: The agency has created an RFx and Bidders have responded. The Agency Buyer will now convert the RFx to an Auction.
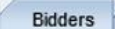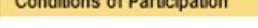
Required Data

Task	Additional Information
Initial Screen	**From the RFx**
1. Click Responses and Awards	The Responses and Awards screen will open. The bid responses are displayed.
2. Click Convert to Auction	A pop-up window will appear.
3. Click Yes	The Convert to Auction screen will open.
4. Click Convert to Auction	The Auction will be created from the RFx.
Write the Auction Number. It will be used in a following exercise.	RFx #_____
5. Click OK	
6. Click Close	

Exercise 2.2 – Complete and Publish Reverse Auction

Scenario Objectives: The auction has been created. The Agency Buyer will complete and publish the Reverse Auction.

Required Data

Task	Additional Information
Initial Screen	**RFx Screen**
1. Click `Tracking` tab	
2. Click the **Auction Number**	The auction document will open in another screen.
3. Click `Edit`	

4. Enter required fields on the `Auction Information`:
Start Date = Today's Date (Current Date)
End Date = Today's Date (Current Date)
Automatic Extensions:
    Remaining Time Trigger = 1
    Extension Period = 1
    Number of Extensions = 1
	Start Time = Current time plus 10 minutes
	End Time = Start Time plus 10 minutes

5. Select `Bidders` tab	The Bidders tab will open. The agency will normally delete all bidders from list that did not qualify to participate in the auction.
6. `Delete` last Bidder.	
7. Select `Items` tab	The Items tab will open.
8. Enter required data on `Items` tab: **Start Price** = The start bid amount for line item. **Reference Price** = The market value for the item. **Reserve Price** = Highest acceptable price **Bid Decrement Amount** = $0.05	Do this for each item.
9. Select `Notes and Attachments` tab	The Notes and Attachments tab will open.
10. Click `Add` and `Conditions of Participation` and type a question to the vendor.	This will allow the Agency Buyer to create a pop-up question where the vendor must agree in order to participate in the Reverse Auction.
11. Click `OK`	
12. Click `Check`	Correct any errors.
13. Click `Publish`	The auction will be published and available for the Bidders to search in MAGIC.

Exercise 2.3 – Open the Live Auction

Scenario Objectives: Once the Start Date and Time of the auction published in exercise 2.2 has passed, the Agency Buyer can open and monitor the auction activity.

Required Data

Task	Additional Information
Initial Screen	**Auction Document published in Exercise 2.2**
1. Click **Live Auction**	The Auction Cockpit will open in a new window.
2. If Java message is displayed, click 'Run'.	
3. Review the **Item Data** section	The list of line items will display with the starting price.
4. Review the **Auction Analysis** section	These tabs (Details, History, Charts, and Factors) give analysis of the auction activity.
5. Review the **Participants** window	This window displays a list of all the available participants for the auction. If the bidder has the auction open, a green check will appear by the bidder's name.
6. Review the **Chat** window	In this window, the Agency Buyer and Bidders can submit messages.

Exercise 2.4 – Complete Surrogate Bid Entry

Scenario Objectives: A Reverse Auction has been published and is available for the Bidder to participate. The Buyer will create surrogate bids.

Required Data

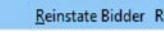| Task	Additional Information
Initial Screen	**Live Auction Cockpit**
1. In the Participant's window expand ⊞ the vendor details.	
2. Right click on the Bidder's name and select "Log on as".	The Buyer is now in the Live Auction as the selected Bidder.
3. Enter a valid bid price in the Item section and click **Submit**	A pop-up window will appear that shows the total value of the bid (bid price X quantity).
4. Click **Yes**	The bid will be submitted.

Task	Additional Information
5. Continue to submit bids for the line items.	
6. Close current screen to return to Buyer's view of the Live Auction cockpit.	Click the 'X' to close the screen and return to Live Auction Cockpit.
7. Repeat Steps 1 through 6 to complete a surrogate bid for an additional Bidder.	

Unit 3 – Monitor Auction and Award Contract

Exercise 3.1 – Monitor Auction

**Scenario Objectives:** The auction is active. The Agency Buyer will extend the auction, ban a bidder, reinstate a bidder, and delete an erroneous auction entry.
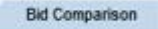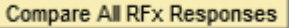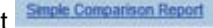
Required Data

Task	Additional Information
Initial Screen	**Live Auction Cockpit**
1. Click ⬆ in the auction controls section	This will allow the Agency Buyer to extend the auction. A pop-up window will appear to allow the Agency Buyer to select the amount of time by which to extend the auction.
2. Enter 2 and click OK	
3. In the participants window, expand a company group and right click on the user. Select Ban Bidder B	An alert will appear that the bidder has been banned.
4. Right click the user again and select Reinstate Bidder R	An alert will appear that the bidder has been reinstated.
5. Click ⏸ to pause the auction.	When the auction is paused, bidders cannot submit bids. The auction time continues to elapse. During a pause, the Agency Buyer can delete erroneous bids.
6. Click OK on the pop-up box that the Auction status has changed to Paused.	
7. Select History in the Auction analysis section to view bids for a line item.	
8. Right click a bid and click Delete	A trash can will appear next to the bid that has been deleted. A message will be broadcast that the bid was removed.
9. Click ▶ to resume the auction.	A pop-up window will appear that the auction has resumed.

10. Allow the auction to end.	
11. Close the Live Auction Cockpit	Click the 'X' to close the screen.

Exercise 3.2 – Bids and Award

Scenario Objectives: The auction has ended. The Agency Buyer will compare bid responses and award contract.

Required Data

Task	Additional Information
Initial Screen	**Auction Document**
1. Click **Bids and Award**	The Bids and Award screen will display.
2. Click **Bid Comparison**	
3. Click **Compare All RFx Responses**	
4. Select **Simple Comparison Report**	This will display the bids in a comparison report.
5. Export Simple Comparison Report	-Go to Menu> List> Export> Spreadsheet. -Select format Excel (in MHTML format), click ✅. -Enter a File Name (or leave as is), click 'Choose'. -File will save in WebGUI browser, click 'OK'. -Click 'OK' again.
6. Access exported Simple Comparison Report	-Click 'Open' and Excel spreadsheet will display. -To save the file, click 'Enable Editing'. -Go to File, Save As. -Enter a File Name. -Select location to save file. -Save As Type = Excel Workbook.
7. Close the report to return to the Auction, Bids and Awards screen.	Click the 'X' to close the screen.
8. Click **Bid Activity**	
9. Click on the response of the winning bid.	
10. Click the **Items**	

11. Check the Accept boxes for each line item	
12. Click Accept to accept the bid	
13. Click the Close button.	
14. On the Bid and Awards screen click 🔁	The status of the bid has changed to Accepted
15. Click on the accepted bid	
16. Click Create Contract	The contract setup is ready.