Create Request For Proposal (RFP) Oversight Approval Exemption Request (OVAR)

INTRODUCTION:

This document provides step-by-step instructions on how to create a Request for Proposal Exemption Request. This process must be used by State Agencies that has requested an exemption to utilize an RFP to procure commodities. The agency will create the Exemption Request using the OVAR RFx type. Upon PPRB approval, the competitive bid (RAEX) will be created from the approved OVAR.

1. Enter User ID and Password to log in to MAGIC:

https://portal.magic.ms.gov

Issuep & Reductibly Spen for Government Harridon and Calarden	Having password problems? Please dick on this links for help User *
MAGIC is the Mississippi Accountability System for Government Information and Collaboration initiative. If you need access or additional information, please go to the <u>http://ms.gov/magic</u> website.	Log On

2. Select Procurement.



3. Select Procurement Work Center.



4. Select the **RFx** under Strategic Sourcing > Create Documents.



5. Select RFx Type **OVAR**, then **Continue**.



RFx Information

Select the **RFx Information** tab > **RFx Parameters** subtab. Enter the following data elements:

Identification:

- a) SMART Number:
 - i. State Agency Business Area Code or Governing Authority Name underscore RAEX (e.g. 1130_RAEX or HINDS COUNTY_RAEX)

Event Parameters:

- b) Major Procurement Category: COMMODITIES
- c) Sub Procurement Category: SUPPLIES/EQUIPMENT NON TECHNOLOGY
- d) **Request Type**: RFP Authorization Request

Dates:

- e) **Start Date**: (*not required*)
- f) Surrogate Bid Entry Deadline: Friday following PPRB meeting date at 5:00 pm
- g) **Opening Date**: Friday following PPRB meeting date @ 5:00pm
- h) Bidder Submission Deadline: Friday following PPRB meeting date @ 5:00pm

RFX Information	Bidders Items Notes and Attac	chments Weights and Scores	Approval Tracking	
RFx Parameters Questions Note	as and Attachments Table Extension Synopsis	User-Specified Status		
Identification Smart Number:	1130_RAEX ✓ Smart Number is External		Event Parameters Currency: Target Value:	USD 🗇 0.00 USD
Type: Product Category: Publication Type:	Oversight Appv Reqst		Detailed Price Information: Follow-On Document: Bidder Can Change RFx Responses: Allow Multiple RFx Responses for Each Company;	No Price Purchase Order or Contract
Organization Purchasing Organization: Purchasing Group: Dates	State of Mississippi - Purchasing	D Show Members	* Major Procurement Category: * Sub Procurement Category: * Request Type:	COMMODITIES SUPPLIES - NON-TECHNOLOGY RFP - AUTHORIZATION REQUEST
Start Date: * Surrogate Bid entry Deadline: Opening Date: End of Binding Period: Valid From / To:	[12:00:00 am] [02/09/2018] [12:00:00 am] [12:00:00 am] [12:00 am] [12:00:00 am] [12:00	2	* Bidder Submission Deadline: Electronic Responses Only: Document Builder Doc Type: Confidential Document:	02/09/2018 12:00:00 am ZRFX_AMEND

Add Items to the RFx

a) Click Items tab, then "Item Type" to select a "Product Category" from the dropdown.

/	RFX Information	Bidders	Items Not	es	and Attachments	Weights and Score	s Approval	Trackin	g
🛨 lt	em Overview								
	RFx Response Require	d for All Items	Bidder Can /	Add	New Items 📃 All	ow RFx Response I	Modification 🔽 I	Bidder Car	n Change
D	etails Add Line 🖌 A	vdd Subline 🔟 🔐	Ut Copy		Paste J Delete Exp	ort			
Ð	Line Number	Item Type	Item Type		Option Type	Product ID	Description	Lot	
	• E2		Material	-					

b) Enter a short description of the commodity (40 characters or less).To search for a Product Category, use the NIGP Code document, and then manually enter number.

Items Note	s and Attachments	Weights and Scor	es Approval Tracking			
Bidder Can A	dd New Items 🔲 Al	low RFx Response	Mudification	Ities		
Cut Copy	Paste / Delete Exp	port Export2 for f	un			
ltem Type	Option Type	Product ID	Description	Lot	Allow RFx Response Modification	Product Category
Foduct Category			RFP Authorization for Consultants			91802

Add Bidders to the RFx

- a) Click on the 'Bidders' tab.
- b) Enter <u>only</u> SOMS MAGIC Vendor number **3102012942** in the "Add Bidder by Company ID" field. Click the "Add" button.



c) The Bidder to be added will display. Click the "OK" button to confirm.

Ad	d Bidders				
E	Organization Name	Company ID	DUNS	Business Partner ID	Contact
	SoMS	3102012942			
					<u> </u>
					OK Cancal

Add Notes to the RFx

a) Synopsis Description (required) – This should be a short concise description of 80 characters maximum. It must begin with: "Request for RFP Exemption for..."



Add Attachments to the RFx

a)

Add "Attac	hments" b	y selecting	Add Attach	iment		
_	RFx Informati	on Bidders	Items	Notes and Attach	ments Con	ditions
~ 1	Notes					
A	dd 🖌 Clear					
	Assigned To	Category			Text Preview	
>						
-	Attachments					
A	dd Attachment	Edit Description	Versioning 🖌 🛛	elete Create Qua	alification Profile	
_	Assigned To	Category	Description	File Name V	ersion Proces	ssor
	The table	toes not contain an	etch w			

b) Note: To allow the document to be visible to the vendor (externally); uncheck the box that indicates "Visible Internally Only".

Add Attachment	
Here you can upload an attach File:	ment. You have to assign it to either the document general data or to an item
Description: * Assign To:	General Data
Visible Internally only:	Keep this attachment internal
	OK Cancel

Attachments can be in any file extension. However, it is normally best practice to use common file extensions such as pdf, xlsx, or doc.

c) The Description field is a short description of the attachment; it can be edited by clicking the "Edit Description" [Edit Description] button.

SAMPLE ATTACHMENTS:

▼.	Attachments					
	dd Attachment Edit Description Versioning . Delete Create Qualification Profile					
	Assigned To	Category	Description	Version	Processor	Visible Internally only
	Document Header	Standard Attachment	RA Exemption Form	1		
	Document Header	Standard Attachment	Item Specifications	1		

Publish the RFx

Publish the RFx by clicking on the Publish button, after you have confirmed that the Exemption Request has all relevant information populated and attached. The Publish button is only visible in "Edit" mode.

Approve RFx

Select Procurement > Procurement Work Center> Universal Worklist (UWL) to approve the RFx.

a) The RFx may require Agency Manager Approval AND Oversight (PPRB) approval.

RFX Information	Bidders Items Notes	and Attachments Conditions	Weights and Scores	Approval Tracking	
Current Status:	Initial		Header Approval Note		
Current Process Step:					
Currently Processed By:					
Approval Process Data:	Download as XML				
Follow Up:	Work Item to Requester at Proce	ess End			
Header Iter	n				
					-
Header Approval St	tatus				
Add Approver R	emove Approver				
Sequence	Process Step	Status	Processor Deterr	mination	
• 001	SRM RFx Completion	Open (No Decision Made)	RFX Agency Mar	nager Approval	

Once the Agency Buyer Manager has approved the OVAR and submitted it by the deadline, OPTFM will review the request for completeness and place it on the PPRB agenda for consideration of the Board at the next monthly meeting.

Follow-on RAEX Creation from an approved OVAR

Once the Exemption Request has been approved by PPRB, a follow-on RAEX must be created from the OVAR. This allows the request to post on the procurement portal.

a.) Click "Create Follow-on RFx



b.) Select "Yes"

Create follow-on RFx?	×	3
If you crea current RF Submitted	te a follow-on RFx, the x will be closed RFx responses will be	
Closed and	I no longer accepted	:12:
	Yes No Cancel	
	Create follow-on RFx? If you creat current RF Submitted closed and	Create follow-on RFx? If you create a follow-on RFx, the current RFx will be closed Submitted RFx responses will be closed and no longer accepted Yes No Cancel

c.) Select "Create"

Сге	ate follow-on RFx		
Sele	ct from the following	transaction types:	
	Transaction Type	Description	
	RAEX	Invitation for Bid-R	
			:
Cre	ate Cancel		

d.) The RAEX will be created in a "Saved" status.

