

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:

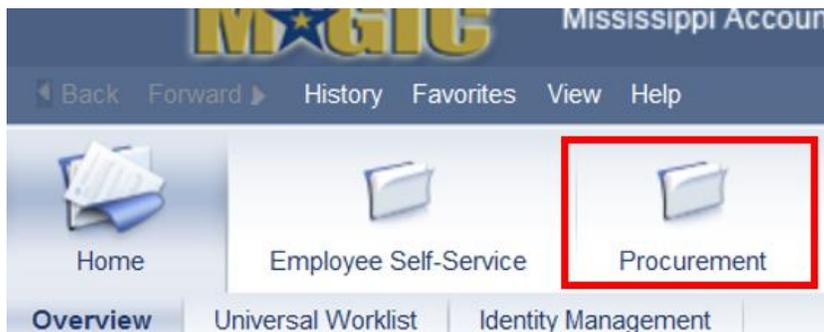
<https://portal.magic.ms.gov>



MAGIC is the Mississippi Accountability System for Government Information and Collaboration initiative.

If you need access or additional information, please go to the <http://ms.gov/magic> website.

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

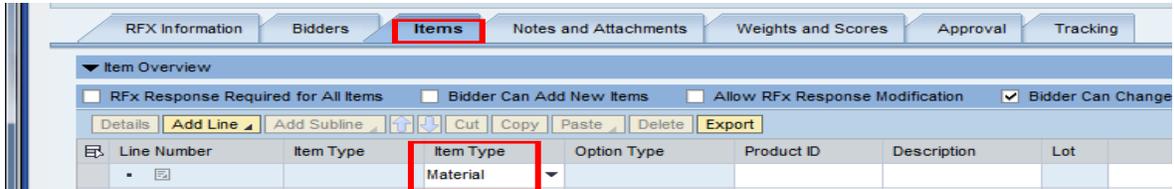
Dates:

- 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

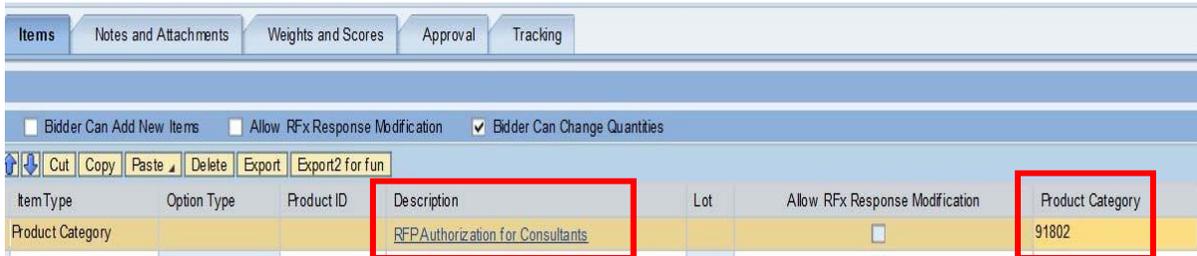
RFX Information	Bidders	Items	Notes and Attachments	Weights and Scores	Approval	Tracking
RFX Parameters	Questions	Notes and Attachments	Table Extension	Synopsis	User-Specified Status	
Identification						
Smart Number:	1130_RAEX					
	<input checked="" type="checkbox"/> Smart Number is External					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

Add Items to the RFx

- a) Click **Items** tab, then “**Item Type**” to select a “Product Category” from the dropdown.



- 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.

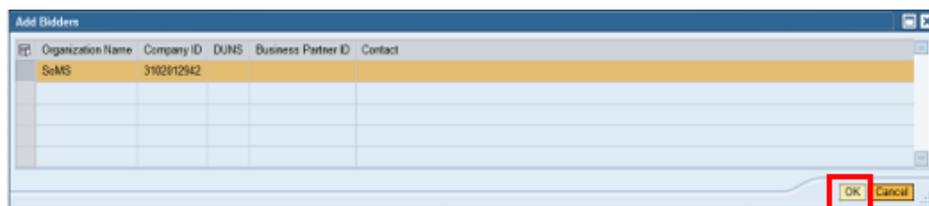


Add Bidders to the RFx

- a) Click on the ‘**Bidders**’ tab.
b) Enter **only** SOMS MAGIC Vendor number **3102012942** in the “**Add Bidder by Company ID**” field. Click the “**Add**” button.

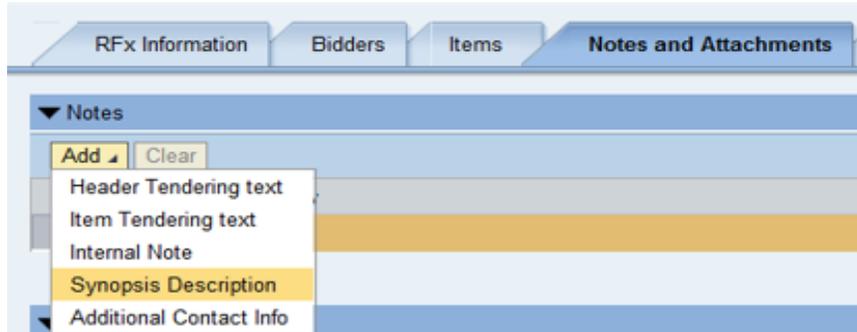


- c) The Bidder to be added will display. Click the “**OK**” button to confirm.



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...”**



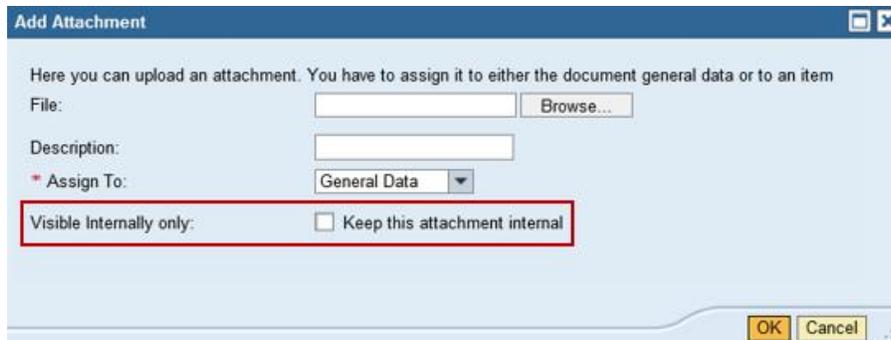
Add Attachments to the RFx

- a) Add “Attachments” by selecting

Add Attachment



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



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”  button.

SAMPLE ATTACHMENTS:

▼ Attachments					
Add 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		<input type="checkbox"/>
Document Header	Standard Attachment	Item Specifications	1		<input type="checkbox"/>

Publish the RFX

Publish the RFX by clicking on the  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.

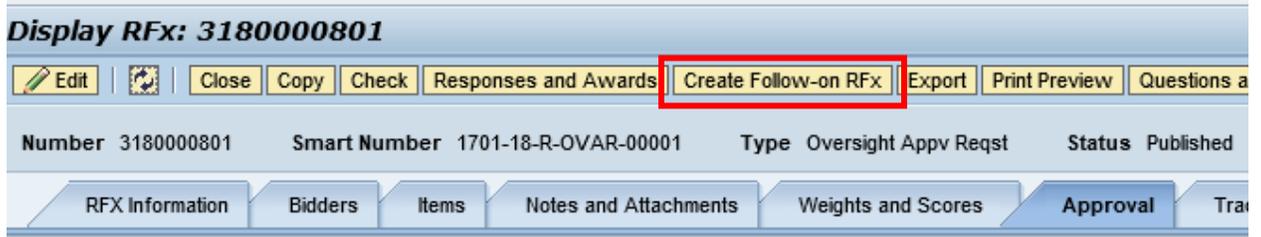
RFX Information	Bidders	Items	Notes and Attachments	Conditions	Weights and Scores	Approval	Tracking
Current Status:	<input type="text" value="Initial"/>		Header Approval Note				
Current Process Step:	<input type="text"/>						
Currently Processed By:	<input type="text"/>						
Approval Process Data:	Download as XML						
Follow Up:	<input type="checkbox"/> Work Item to Requester at Process End						
Header		Item					
Header Approval Status							
Add Approver Remove Approver							
Sequence	Process Step	Status	Processor Determination				
▪ 001	SRM RFX Completion	Open (No Decision Made)	RFX Agency Manager 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.

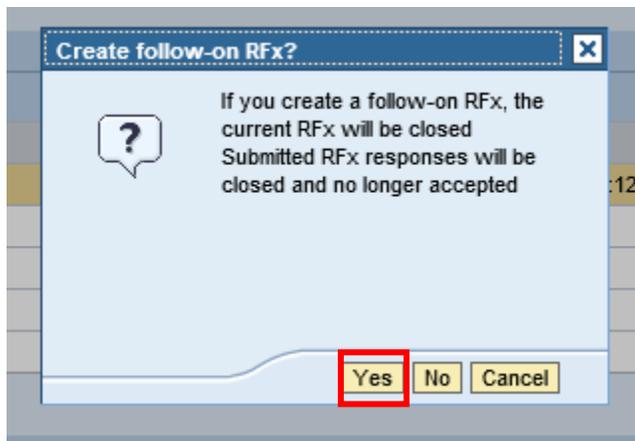
Follow-on RAEX Creation from an approved OVAR

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.

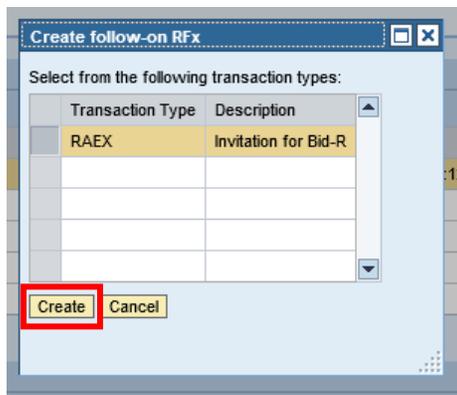
- a.) Click "Create Follow-on RfX"



- b.) Select "Yes"



- c.) Select "Create"



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

