City of Phoenix

Submitter's Handbook

Office of the City Engineer Design and Construction Procurement

### Introduction

The City of Phoenix uses the SAP Supplier Relationship Management (SRM) for eProcurement. RFx (Solicitation) is part of the eProcurement system.

Consultants and Contractors (Submitters) are invited to participate in the response of an RFx via the City of Phoenix Supplier Portal. Submitters must register with the City of Phoenix with appropriate Product Categories to be invited via email for the applicable solicitations. Submitters are to register via <a href="https://www.phoenix.gov/finance/vendorsreg">https://www.phoenix.gov/finance/vendorsreg</a>. Submitters will only be invited to participate per the Product Category(s) pertaining to the RFx and a Supplier List is used to invite Submitters registered under the associated Produ

Once received, Submitters are to respond to the invitation before the Submission Date/Time elapses. Responses from Submitters are to be entered in the Supplier Portal for the City of Phoenix Contracts Specialist to review in the SAP eProcurement Portal. Submitters are responsible for the completeness and accuracy of their RFx Response submission.

It is imperative that Submitters log-in to the City of Phoenix Supplier Portal regularly to view their Invitations for RFx Response, check the status of their RFx Response(s) and to take appropriate timely actions relating to the RFx.

## Accessing the City of Phoenix Supplier Portal

Submitters will receive the Invitation for RFx Response via the City of Phoenix Supplier Portal. Submitters will log-in to the City of Phoenix Supplier Portal at URL https://eprocurement.phoenix.gov/irj/portal

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	User * Password * Log On Logon Problems? Get Support

Submitters may use any internet browser to log-in to the Supplier Portal, however, Internet Explorer 11 and Google Chrome are recommended.



After successfully logging in to the City of Phoenix Supplier Portal, the following screen appears.

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To access RFx information, click the RFx and Auctions tab on the ribbon. Submitters will see an Overview of all RFx(s) that they are invited to Respond to.

SAP	Search:
∢Back Forward	
RFx and Auctions Administration Messages	
Home Create Users Own Data Company Data	
Administration > Home	
Welcome Vendor Administrator	
Thank you for your interest in becoming a vendor in the City of Phoenix Portal.	
As a Vendor Administrator for your company you have the authority to:	
<ul> <li>Maintain Own Data</li> <li>Create Additional Users</li> <li>Maintain your Company and User data</li> <li>Maintain your Product Category selections</li> <li>Access Vendor Help Portal</li> </ul>	
It is your responsibility to keep all information current. If your e-mail address is not correct, your firm shall be deleted from our vendor file when we perform a maintenance check of the electronic notification for all applicable solicitations. Vendors must routinely check our City of Phoenix Bids site for a listing of current business opportunities. The Vendor Administrator Divis for any particular reason.	system. Being a registered vene sion will not be responsible if a vene sion will not be respo
If you have any questions, please visit our City of Phoenix Portal site at: https://www.phoenix.gov/financesite/Pages/EProc-help.aspx	
If you would like additional assistance, please send an email to vendor.support@phoenix.gov or call (602)262-1819.	
Thank you for registering!	



If logging in for the first time, the RFx Overview will allow Submitters to see all active RFx Events (Numbers), Descriptions, Types, and Status as well as the Start and End Dates / Times.

Submitters should click the Refresh button to ensure that current / updated RFx data is loaded.

Submitters can also filter this list by clicking the Show Quick Criteria Maintenance button. Submitters can choose to display a specific RFx by searching for it.

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## Displaying an RFx Event

To Display an RFx Event, Submitters should click the gray box next to the Item and then click the **Display Event** button to display details of Solicitation. If you do not see a new window pop up, it mostly likely is a **POP UP BLOCKER** that will need to be removed in order to continue.

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The RFx Event will open in a new window.

Review information on the RFx Information Tab.

- Start Date / Time: This is the Start Date / Time to submit an RFx Response. Submitters cannot Create a Response prior to this Date / Time.
- Submission Deadline Date / Time: Last Date / Time for submitting an RFx Response.
- Opening Date / Time: Date/Time on which RFx Responses are open for Contracts Specialist review.

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Submitters must choose to 'Participate' in order to receive RFx Event level emails associated with the RFQ, Noticiations, Attendance Sheets, etc. There are no RFx level emails that are generated, i.e. a confirmation email once you submit your SOQ via the ProcurePHX system.

Participate	Do Not Participate	Tentative

Some Submitters may see a 'Register' button instead of Participate, Do Not Participate, or Tentative. Once you click the 'Register' button, those three additonal options should appear, which will then allow you to click 'Participate'.

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## Creating an RFx Response

Once the Start Date /	<sup>7</sup> Time has passed	, Submitters can click the	Create Response	button.
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The Submitter's RFx Response will open in a new window.

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Create RFx Response         Submit       Read Only       Print Preview       Check       Close         RFx Response Number       7000000157       RFx Number         RFx Response Version       Number       Active Version         RFx Information       Items       Notes and Attach         Basic Data       Questions       Notes and Attachments         Event Parameters       Event Parameters	Save Export Import Questions and Answers 6000000583 Status In Process Sut RFx Version Number 2 Imments Summary Tracking	s ( 0 ) System Information Create Memory S omission Deadline 07/11/2018 14:00:00 MST Status and Statistics Created On: Created By:	Snapshot TNO Opening Date 07/11/2018 14:00:00 MSTI s 07/11/2018 13:45:44 MSTNO Ms. Yesenia Mejia			
Create RFx Response         Submit       Read Only       Print Preview       Check       Close         RFx Response Number       7000000157       RFx Number         RFx Response Version       Number       Active Version         RFx Information       Items       Notes and Attach         Basic Data       Questions       Notes and Attachments         Event Parameters       Event Parameters	Save Export Import Questions and Answers 6000000583 Status In Process Sut RFx Version Number 2 Imments Summary Tracking	s (0) System Information Create Memory S omission Deadline 07/11/2018 14:00:00 MST Status and Statistics Created On: Created By: Last Processed On:	Snapshot TNO Opening Date 07/11/2018 14:00:00 MSTI s [07/11/2018 13:45:44 MSTNO] [Ms. Yesenia Mejia [07/11/2018 13:45:44 MSTNO]			
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Create RFx Response         Submit       Read Only         Print Preview       Check         Close         RFx Response Number       7000000157         RFx Response Version       Number         Active Version         RFx Information       Items         Notes and Attachments         Event Parameters         Currency:       American Dollar	Save Export Import Questions and Answers 6000000583 Status In Process Sut RFx Version Number 2 Imments Summary Tracking	s (0) System Information Create Memory S omission Deadline 07/11/2018 14:00:00 MST Status and Statistics Created On: Created By: Last Processed On:	Snapshot TNO Opening Date 07/11/2018 14:00:00 MSTI s [07/11/2018 13:45:44 MSTNO] [Ms. Yesenia Mejia [07/11/2018 13:45:44 MSTNO]			
Create RFx Response         Submit       Read Only         Print Preview       Check         Close         RFx Response Number       7000000157         RFx Response Version       Number         Active Version         RFx Information       Items         Notes and Attach         Basic Data       Questions         Notes and Attachments         Event Parameters         Currency:       American Dollar	Save Export Import Questions and Answers 6000000583 Status In Process Sut RFx Version Number 2 Imments Summary Tracking Conditions	area to review s(0) System Information Create Memory S omission Deadline 07/11/2018 14:00:00 MST Status and Statistics Created On: Created Dn: Created By: Last Processed On: Last Processed By:	Snapshot TNO <b>Opening Date</b> 07/11/2018 14:00:00 MSTI <b>s</b> 07/11/2018 13:45:44 MSTNO Ms. Yesenia Mejia 07/11/2018 13:45:44 MSTNO Ms. Yesenia Mejia	NO Remaining Time 0 Days 00:14:18 RF:	x Owner Training Buyer12 Total Value 0.00 USD	
Create RFx Response         Submit       Read Only         Print Preview       Check         Clock       Clock         RFx Response Number       7000000157         RFx Response Version       Number         RFx Response Version       Number         RFx Information       Items         Notes and Attach         Basic Data       Questions         Notes and Attachments         Event Parameters         Currency:       American Dollar	Save Export Import Questions and Answers 6000000583 Status In Process Sut RFx Version Number 2 Imments Summary Tracking Conditions	area to review s(0) System Information Create Memory S omission Deadline 07/11/2018 14:00:00 MST Status and Statistics Created On: Created Dn: Created By: Last Processed On: Last Processed By:	Snapshot TNO <b>Opening Date</b> 07/11/2018 14:00:00 MSTI <b>s</b> 07/11/2018 13:45:44 MSTNO Ms. Yesenia Mejia 07/11/2018 13:45:44 MSTNO Ms. Yesenia Mejia	NO Remaining Time 0 Days 00:14:18 RF:	x Owner Training Buyer12 Total Value 0.00 USD	

Submitters should review each Note Category to ensure they are following RFx Response requirements. Submitters can open the Note Categories by clicking on the hyperlinked text next to each.

Create RFx Response	
Submit   Read Only Print Preview   Check Close Save Export Import Questions and Answers (0) Syst	vstem Information Create Memory Snapshot
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RFx/Auction Text Th	The City of Phoenix is seeking up to 18 qualified consul
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Purchaser's Remarks -E	-Empty-
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Purchaser's Remarks	-Empty-
	Change Conditions of Participation

<ul> <li>Attachments</li> </ul>						Change Conditions of Parti	cipation		
	escription Versioning 🖌 E	elete Create Profile				Conditions of Participation:	See attached Request for Qualifications.		
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RFx/Auction Text				The City (	of Phoenix is seekir	o 18 qualified consul					
Bidder's Remarks				-Empty-							
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✓ Attachments					Change RFx/Au	Text					
Add Attachment Edi	t Description Versioning 🖌 I	Delete Create Profile			RFx/Auction Te	he City of Phoenix is seeking up to 18 qualified consultants to provide s	soils and materials				
Category	Description	File Name	Version Proce	essor Checked Out	t	esting on-call services on an as-needed basis from January 1, 2019 to E ith an option to extend the contract for an additional one-year period. T	These contracts will				
		Request for Qualifications.pdf				e administered by the Street Transportation Department.					
							OK Cancel				

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Conditions of Pa	rticipation			See attach	ed Request for Qu	alifications.							
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Add Attachment	Edit Description Versioning 🖌	Delete Create Profile			RFx/Auction Tex	The City of Phoenix is seekin testing on-call services on an	g up to 18 qualified consultar	nts to provide soils and ma	aterials				
Category	Description	File Name	Version Processor	Checked Out		with an option to extend the c	ontract for an additional one-	year period. These contra					
Standard Attach	ment Request for Qualifications	Request for Qualifications.pdf	f 1			be administered by the Street	t transportation Department.						
								OK	Cancel				
									//				

# Submitters can open RFx Attachments by clicking on the hyperlinked text and choosing Open or Save.

								Options 🔻
Crea	ate RFx Response							
	mit   Read Only Print Preview   Check Close Save Export Import Questio	ons and Answers (0) System Information Create Memory Snapsho	yt					<b>2</b> 4
RFx	Response Number 7000000157 RFx Number 6000000583 Status in Pr RFx Response Version Number Active Version RFx Version Number 2	rocess Submission Deadline 07/11/2018 14:00:00 MSTNO	Opening Date 07/11/2018 14:00:00 MSTNO	Remaining Time 0 Days 00:14:18	RFx Owner Training Buyer12	Total Value	0.00 USD	
	RFx Information Items Notes and Attachments Summary Tracki	ing						
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-	Notes							
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	Bidder's Remarks	-Empty-						
	Purchaser's Remarks	-Empty-						
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		Do you want to open or save <b>Request for Qualifications.pdf</b> (	86.2 KB) from <b>srm.qa.phoenix.gov</b> ?	Open Save	▼ Cancel ×			

The RFx system will show a variety of messages in the Header Messsage area.

Red warnings require mandatory review and must be corrected in the Response prior to clicking the Submit button. Yellow and Green messages are for information and may need discretion to correct.

In this case, the messages are stating that Submitters must respond to each Line Item before the RFx Response can be Submitted. This screen shot is for illustration purposes only.

Create RFx Response	
Submit   Read Only Print Preview   Check Close Save Export Import Questions and Answers (0) System Information Create Memory Snapshot	
🏭 Line 0002: Attribute Did you provide a response? is mandatory; maintain attribute value	
🕕 Line 0003: Attribute Did you provide a response? is mandatory; maintain attribute value	
🕕 Line 0004: Attribute Did you provide a response? is mandatory; maintain attribute value	
🕕 Line 0005: Attribute Did you provide a response? is mandatory; maintain attribute value	
Time zone MSTAZ is not valid in country US (several possibilities) - Display Help	
RFx Response Number 7000000157 RFx Number 6000000583 Status In Process Submission Deadline 07/11/2018 14:00:00 MSTNO O RFx Response Version Number Active Version RFx Version Number 2	Opening
RFx Information Items Notes and Attachments Summary Tracking	
▼ Item Overview	



g Date 07/11/2018 14:00:00 MSTNO

Notes and Attachments

On the Header

tab, Submitters are able to upload their RFQ Response document(s).

Add Attachment To upload an Attachment, Submitters should click the button. 

Create RFx Response									
Submit Read Only Print Preview	Check Close Save Export	Import Questions and Answers (	(0) System Info	ormation Create Memory Snap	shot				
👫 Time zone MSTAZ is not valid in countr	y US (several possibilities) - Displa	ay Help							
RFx Response Number 7000000157 RFx Response Version Number	RFx Number 6000000583 Active Version RFx Version		nission Deadline	e 07/11/2018 14:00:00 MSTNO	Opening I	Date 07/11/2018 14:00:00 MSTN	O Remaining Time	0 Days 00:11:23	RFx Owner Training Buyer12
RFx Information Items	Notes and Attachments	Summary Tracking							
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Add Attachment Add URL Edit De	scription Versioning 🖌 Delete	Create Qualification Profile							
Assigned To	Category	Description	File Name	Version		Processor	Checked Out	Туре	Size (KB)
i The table does not contain any	data								1

NOTE: When saving and naming your file before attaching, do not use any special characters (\_\*#\$>, etc), and do not use a long name. They system may not properly load your SOQ which may result in disqualification.

			Options 🔻	
			2 ▲	
Total Value	0.00 USD			
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Submitters should click the Browse...

button and navigate to their desired attachment document.

Add Attachment	X	-
Here you can upload an attachment. You have to assign it to either the document general data or to an item File: Browse Description: * Assign To: General Data		
OK Cancel	//	

## SHORT FILE NAME NO SPECIAL CHARACTERS

Submitters should add a Description and then click OK.

Add Attachment		
File: Description:	hment. You have to assign it to either the document general data or to H:\SAP\RFx\My Compan Browse pany's Response to RFQ General Data	o an item
	OK	Cancel

tab provides Submitters with a high-level overview of their RFx Response.



Summary

The

Before clicking the Submit button, Submitters should click the Check button to ensure that all system errors are gone.

		Options 🔻
Create RFx Response		
Submit   Read Only Print Preview   Check Cle	ose Save Export Import Questions and Answers ( 0 ) System Information Create Memory Snapshot	€ 4
RFx Response Number 7000000157 RFx Nur RFx Response Version Number Active Versio		
RFx Information Items Notes and Atta	achments Summary Tracking	
	RFx Response Number: 7000000157	
	Items with Response: 2 out of 2 items responded to	
	Questions: 0 out of 0 questions answered ( 0 out of 0 mandatory)	
	Notes: 1 notes added	
	Attachments: 1 attachments added	
· · · · · · · · · · · · · · · · · · ·	achments Summary Tracking RFx Response Number: 7000000157 Items with Response: 2 out of 2 items responded to Questions: 0 out of 0 questions answered ( 0 out of 0 mandatory) Notes: 1 notes added	

If all errors are gone, Submitters can Submit their RFx Response by clicking the Submit button.

	Options <b>T</b>
Create RFx Response	
Submit Read Only Print Preview Check Close Save Export Import Questions and Answers (0) System Information Create Memory Snapshot	<b>2</b> 4
RFx response is complete and contains no errors	
RFx Response Number       7000000157       RFx Number       6000000583       Status       In Process       Submission Deadline       07/11/2018       14:00:00       MSTNO       Remaining Time       0       Days       00:10:49       RFx Owner       Training Buyer12       Total Value       0.00       USD         RFx Response Version Number       Active Version       RFx Version Number       2       0.00       USD	
RFx Information Items Notes and Attachments Summary Tracking	
RFx Response Number: 7000000157	
Items with Response: 2 out of 2 items responded to	
Questions: 0 out of 0 questions answered ( 0 out of 0 mandatory)	
Notes: 1 notes added	
Attachments: 1 attachments added	

Submitters will see a confirmation message that your response was submitted. No email notification will be sent. Confirm you have the required number of attachments listed, as outlined in the RFQ.

	Options 🔻
Display RFx Response:	
🖉 Edit   Print Preview   🍫 Close Vithdraw Export Questions and Answers ( 0 ) System Information Create Memory Snapshot	₽ 🕥
RFx response 7000000157 submitted	
RFx Response Number 7000000157 RFx Number 6000000583 Status In Process Submission Deadline 07/11/2018 14:00:00 MSTNO Opening Date 07/11/2018 14:00:00 MSTNO Remaining Time 0 Days 00:10:49 RFx Owner Training Buyer12 Total Value 0.00 USD RFx Response Version Number Active Version RFx Version Number 2	
RFx Information Items Notes and Attachments Summary Tracking	
RFx Response Number: 7000000157	
Items with Response: 2 out of 2 items responded to	
Questions: 0 out of 0 questions answered ( 0 out of 0 mandatory)	
Notes: 1 notes added	
Attachments: 1 attachments added	
Submitters can refresh the RFx Event by clicking the is button.	

Display RFx :						
Print Preview Close Do Not Participate Tentative Create Resp						
RFx Number 6000000583 Smart Number PHX-19-R-ZCIP-63-000004-0 RFx Version Type Active Version	01 RFX Status Published	RFx Start Date 07/11/2018 13:30:00 MSTNO	Submission Deadline 07/11/2018 14:00:00 MSTNO	Remaining Time 0 Days 00:14:32	RFx Owner Training Buyer12	RFx Versior

Once refreshed, the Submitter will see the RFx Response number listed. Submitters can then click the Close button. Return to the RFx Overview (Event) Page.

Display RFx :
Print Preview   🔯 Close Do Not Participate Tentative Questions and Answers ( 0 ) Export System Information Create Memory Snapshot
RFx Number 6000000583 Smart Number PHX 10 R ZCID 53 000004 001 RFX Status Published RFx Start Date 07/11/2018 13:30:00 MSTNO Submission Deadline 07/11/2018 14:00:00 MSTNO Remaining Time 0 Days 00:10:09 RFx Owner Training Buyer12 RF: RFx Version Type Active Version RFx Response 7000000157
RFX Information Items Notes and Attachments
RFx Parameters   Questions   Notes and Attachments   Table Extensions

		Options 🔻
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sion Number	2	
ion Number	2	<u> </u>



The RFx Overview (Event) Page will update with the Submitter's RFx Response number, and Submitter's Response Status. After Submitting an RFx Response, you should return to this page to confirm your Response Status has changed to SUBMITTED. A Response Status of IN PROCESS or SAVED will not count your Submittal as received in the system. Make sure to always click the Refresh Button, and view your Response Status.

	Log off
When Submitters are finished, Submitters should click the	

button.

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	(Chan deed ) (and									
	[Standard View]	Create Response   Display Event D     Event Description		Event Status	Start Date	End Date	Response Number	Response Status	Event Version	F
	000000583	PHX-19-R-ZCIP-63-000004-001	Event Type RFx for CIP	Published	07/11/2018	07/11/2018	700000157	Submitted	2	
	000000578	PHX-19-R-2CIP-83-000004-001	RFx for CIP	Published	07/10/2018	07/11/2018	700000137	No Bid Created	2	
	000000553	PHX-18-R-ZCIP-63-000026	RFx for CIP	Published	06/28/2018	07/20/2018		No Bid Created	1	
	000000294	PHX-17-R-ZIFB-35-000007	Invitation for Bids	Published	00/20/2010	12/06/2016	700000023	Submitted	1	
	000000291	PHX-17-R-ZIFB-35-000005-001	Invitation for Bids	Published		12/02/2016	700000022	Submitted	2	
		PHX-17-R-ZIFB-35-000003-001	Invitation for Bids	Published		12/07/2016	700000024	Saved	2	
	00000239			Published		10/19/2016	700000011	Submitted	1	
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60	000000239	PHX-17-R-ZIFB-35-000002	Invitation for Bids							
60		PHX-17-R-ZIFB-35-000002	Invitation for Bids							

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If you are returning to your RFx Event after logging off, make sure to click the Refresh Button to see the most updated information. You can easily access your RFx Response, by locating the Response Number associated with the RFx Event you want to edit. Click on your RFx Response Number (hyperlink), and a new window will pop-up which will allow you to make changes to your RFx Response directly. Remember, you can't make changes to any attachments within the system. You can only add or delete attachments. Document editing should be done on your PC.

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RFx Response numbers will not appear unless you've accessed the RFx Event and saved any actions within the system.

A Response Status of '**In Process'**, or '**Saved'** indicates a need to complete a step(s) before the system will update your RFx Response to Submitted. Your Response Status should display as '**Submitted**' by the Submittal Deadline.

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### **Additional Notes**

Submitters can click the Save button to Save a "Work in Progress" RFx Response.

Submitters can click the *Edit* button to enter Edit mode on their RFx Response.

Submitters can click the <sup>Delete</sup> button to Delete a "Work in Progress" RFx Response.

Submitters can re-Submit their RFx Response up until the Submission Deadline Date / Time.

Submitters can also Withdraw their RFx Response by clicking the Withdraw button.

### **QUICK TIP:**

To Edit your RFx Response you must **not** be in 'DISPLAY' mode. Your window should either say "Edit RFx Response' or 'Create RFx Response' in the top left corner of your screen.

