



RFQ & OQ Portals
LOG-MM-018
Oct 23, 2008

LaGov

Version 1.2
Updated: 10/22/2008



Today's Workshop Objectives

- Review Current LaPAC Portal Functionality
- Process for Entering new information to the Portal
- Process for Changing information on the Portal
- Process for Deleting/Removing Information from the Portal



Today's Workshop Objectives

- Review Current ECAT Portal Functionality
- Process for Entering new information to the Portal
- Process for Changing information on the Portal



Today's Workshop Objectives

- Review Glossary
- Outline LaGov Solution Options



As-Is Overview



As-Is LaPAC Portal

- Louisiana Procurement And Contract Network (LaPAC) is a web application where bids (solicitations or request for proposals) and award information are posted by participating state agencies and political subdivisions for viewing by the public and vendors
- LaPAC is available 24 hours a day, 7 days a week
- Access to LaPAC Public Menu
 - No log-in required
 - Search and view bid opportunities by category (broader than commodity class), by department, by bid number, by status, or can search for open bids by various other methods
 - Download or print bids



As-Is LaPAC Portal

- Access to LaPAC Agency Menu
 - Log in is required
 - Post bid or addenda
 - Edit manually posted bids or addenda
 - Search and view bid opportunities under review, by category (broader than commodity class), by department, by bid number, or can search for open bids by various other methods
 - Download, or print bids
 - Search and view registered and deleted vendors
 - Maintain List of Categories (Alphabetical listing of all categories for searching for bid)
 - Maintain List of Commodity Codes (List of commodity classes and items)
 - Maintain List of Holidays for current year



As-Is LaPAC Portal

- Access to LaPAC Agency Menu (Continued)
 - Maintain List of LaPAC Vendors for possible deletion
 - Delete Bid and/or Addenda Document
 - Run Notify Report by Month and/or Status (List of Vendors that have been notified to renew their LaPAC subscription)
 - Maintain List of Department URL's
- LaPAC Security Permissions
 - Post Bid to Internet
 - Security Administrator for Agency
 - Security Administrator for LaPAC
 - Office of State Purchasing
 - Vendor



As-Is LaPAC Portal

- Security permissions are maintained within LaPAC. A user or vendor registered in LaPAC may or may not be registered in AGPS.
- Search methods for bids
 - Department
 - Commodity Category
 - Specific Bid Number
 - Status
- Search methods for registered vendors
 - Company Name
 - Contact Last Name
 - EMail Address
 - City
 - Parish
 - State
 - Commodities
 - SEBD
 - SmallE



As-Is LaPAC Portal

- There are two ways to post a bid or addenda in LaPAC
 - Auto-Post from AGPS
 - Manually within LaPAC
- Auto-post :
 - An AGPS solicitation or addenda can be flagged for “auto-post”, which will automatically post it to LaPAC through an interface between AGPS and LaPAC. This is only used if the *entire* solicitation document is created in AGPS. Only those commodities having an AGPS LaPAC Class/LaPAC Category are submitted to LaPAC.
 - Upon submitting the solicitation or addenda from AGPS to LaPAC
 - Print file created
 - File to be posted in LaPAC created.
 - When a contract or purchase order is awarded from the bid the award information is posted.



As-Is LaPAC Portal

- Manual posting: (Need to change)
 - Used when a solicitation is processed in AGPS but not flagged for “auto-post”, e.g., the AGPS document is used for header information and line items, but there are also attachments (Word, Excel, manual drawings, etc.) which are part of the entire solicitation package.
 - Used when the entire solicitation is a Word, Excel, or PDF document (solicitation not processed in AGPS). Documents may be attached to the manually created posting in a PDF, Word or Excel format.
 - When a proposal for services needs to be advertised as CFMS does not capture the request / proposal process.
- Upon posting a bid or addenda to LaPAC, (whether automatic or manual), email notifications are sent out
 - The poster is sent an email with the list of LaPAC vendors who received email notification
 - Vendors registered for that commodity are sent an email notification of a bid or addenda for their review



As-Is LaPAC Portal

- Vendors who self-register in LaPAC can perform the following...
 - Self-register in LaPAC for bids or proposals opening in their area of service.
 - Change their password, company, information, location information, or add/remove commodities.
 - View or download bids posted. Bids of interest can be printed and submitted by mail.
 - Can maintain their contact information, commodities or service.



As-Is LaPAC Portal

- A un-awarded Bid will stay in LaPAC 180 days after the bid opening date
- An awarded Bid will stay in LaPAC 180 days after the award date
- A Bid will stay in LaPAC 30 days after it is cancelled

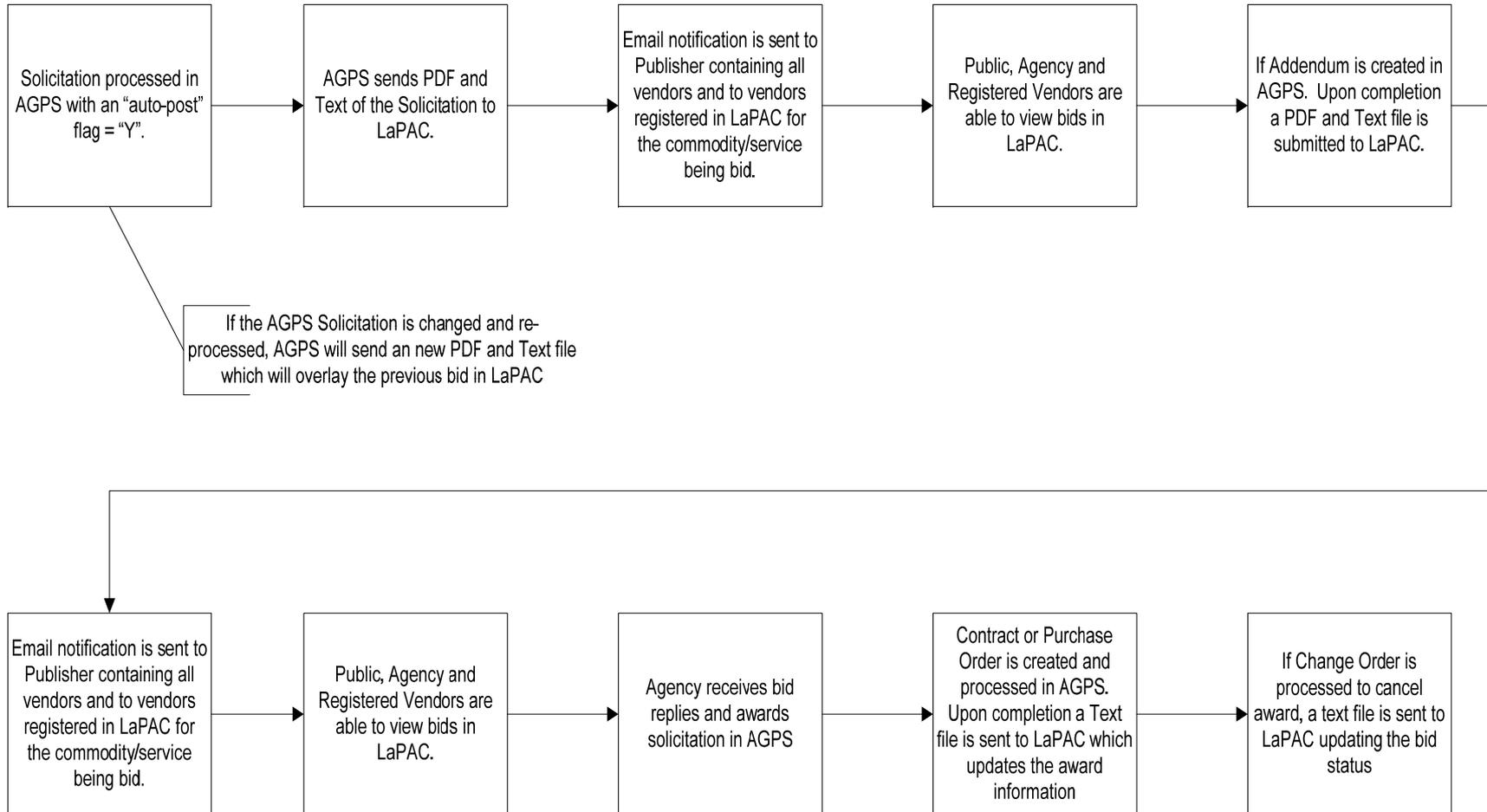


As-Is LaPAC Portal

- Vendors are periodically purged (no activity) from LaPAC
 - 1st Notice: After being registered for 12 months, vendor is sent warning notification
 - 2nd Notice: After being registered for 13 months, vendor is sent warning notification
 - 3rd Notice: After being registered for 14 months, vendor is sent warning notification
 - 4th Notice: After being registered for 15 months, vendor is notified and deleted
- Once purged Vendor records are placed on a history table (archive table)
- Vendors on the history table can not be viewed by the public. Only LaPAC Security Administrators can view these history tables

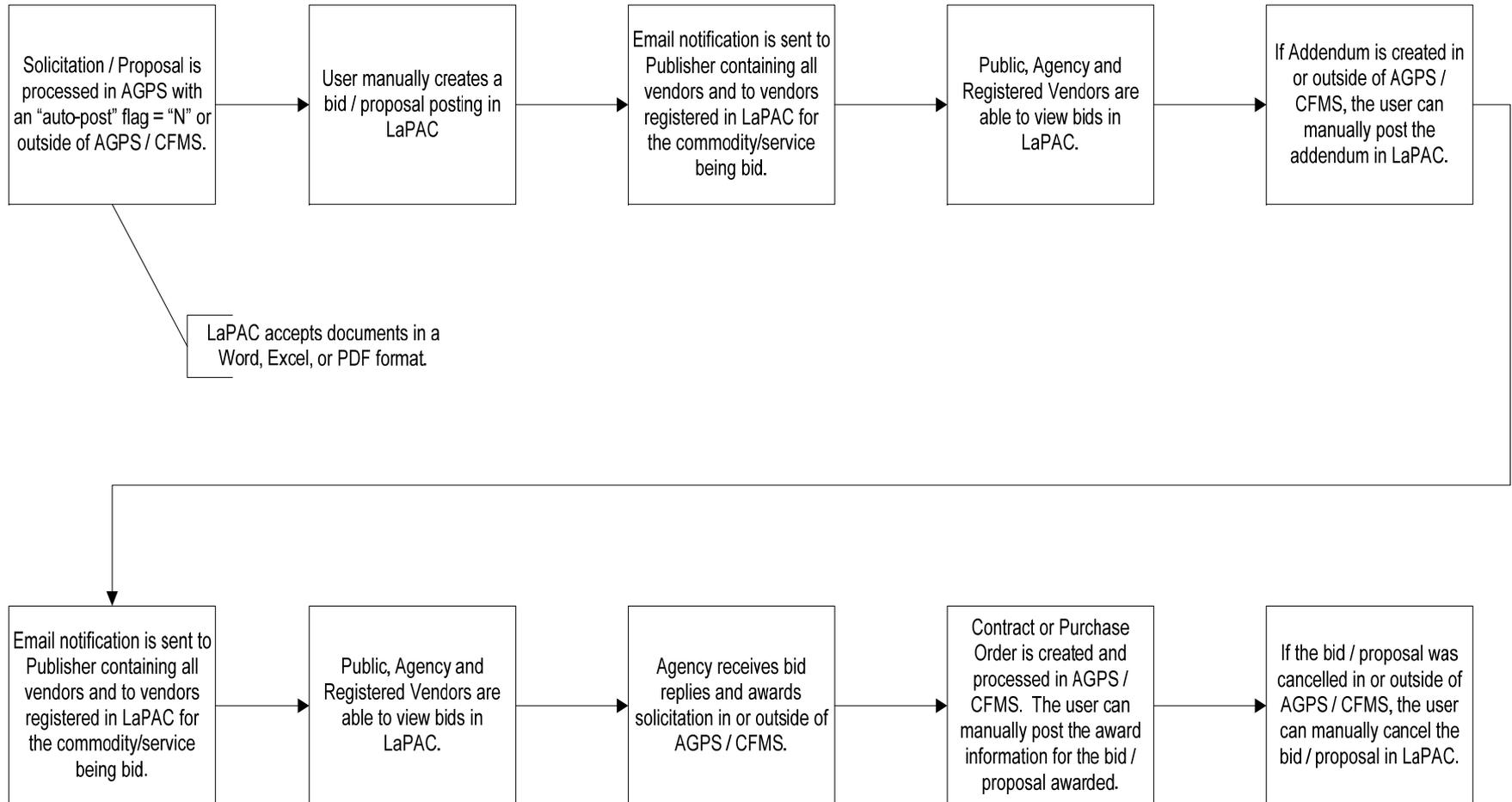


As-Is LaPAC “Auto-Post” Bid Award Process





As-Is LaPAC “Manual” Bid Award Process





As-Is ECAT Portal

- ECAT is Louisiana's web based purchasing system that enables the online creation and submission of requisitions
- ECAT is available 24 hours a day, 7 days a week
- Access to ECAT Contract / Item Search
 - No log-in required
 - Search and view statewide commodity contracts by description, vendor name, SEBD vendor, SE/HI Vendor, item description, class, sub-class, t-number description, or t-number (logical grouping)
 - Search and view statewide commodity contracts by contract number, item number, item description, class, sub-class, brand, or model



As-Is ECAT Portal

- **XXX need to look at**
- Log in is required
- Search for contracts, contract items, or contract / distributor vendors
- Create or edit requisitions or purchase orders
- View or print purchase orders
- Maintain system related information (i.e. PCARD Purchase Limit, Agency, News Items, Support Email Addresses, Users, Vendors, Unit Of Measure for Punch-out Vendors)



As-Is ECAT Portal

- Security is maintained in ECAT for Non-AGPS Users and Vendors. Security for AGPS Users are maintained in AGPS
- There are two ways to create a requisition in ECAT
 - Punch-out “Requisition”
 - Manually “New Requisition”
- There are various payment methods available for ECAT requisitions
 - PCard
 - No Accounting
 - Submit to AGPS for encumbrance and payment
 - Submit to third party for encumbrance and payment

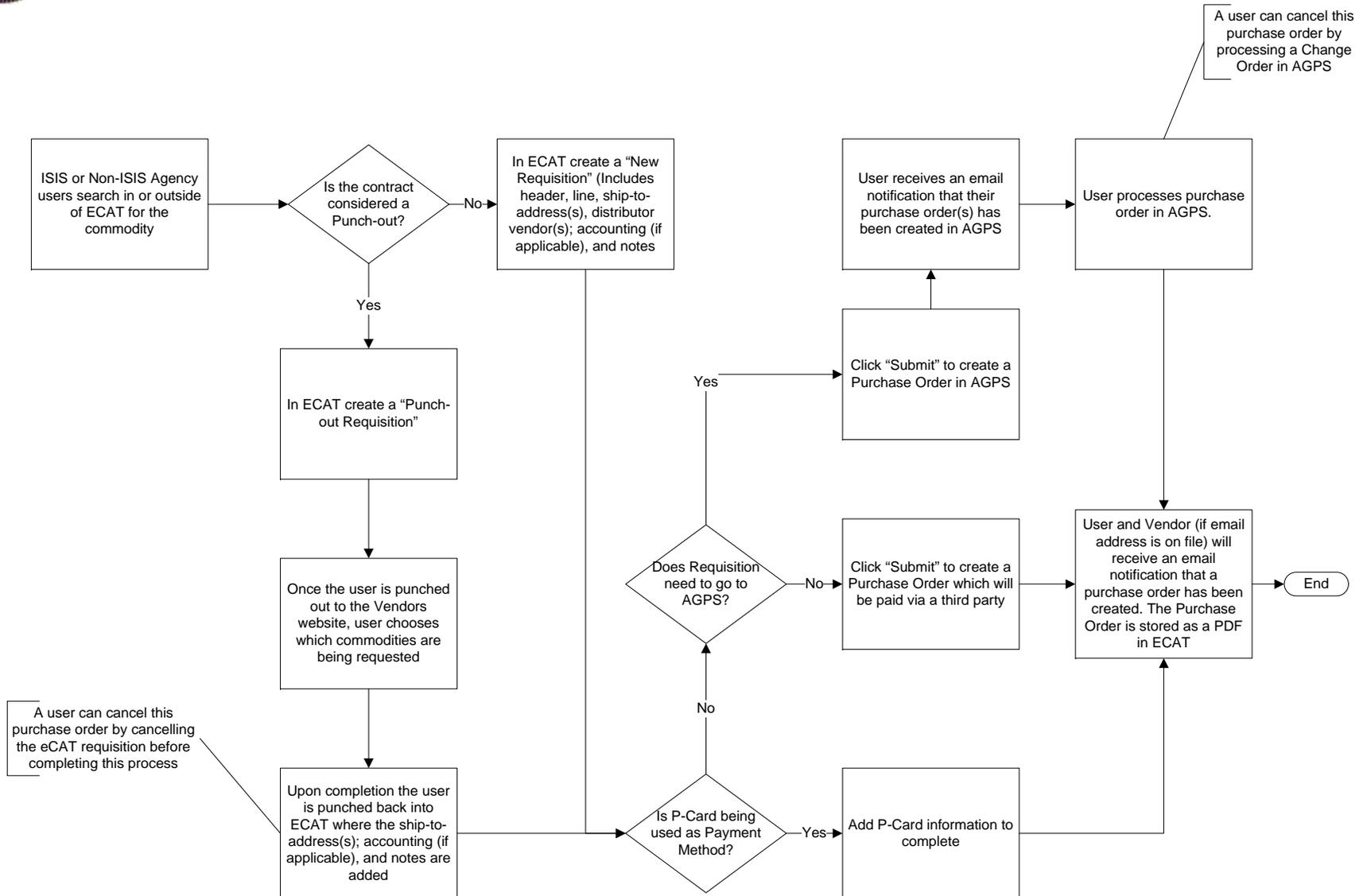


As-Is ECAT Portal

- Changes to active statewide contracts, agency, or commodity information are sent from AGPS to ECAT each night through a batch process. This includes the SEBD or SE/HI vendor status.
- Users can create one “requisition” for various contracts, contract items, vendors, and ship-to-addresses.
- Requestors and Agency Buyers receive email notifications upon a requisition becoming a purchase order, requisition loading into AGPS, or AGPS purchase order loading into ECAT.
- Contract Vendors who enroll in ECAT will receive an email notification containing a link to their purchase order.
- Currently no archive exists for ECAT requisitions or purchase orders.



As-Is ECAT Requisition to Purchase Order Process





As-Is DOTD Portals

- DOTD uses portals for “Construction Letting Information” and “Consultant Contract Services”
- Consultant Contract Services Portal includes...
 - All Advertisement Postings
 - Synopsis Document
 - Advertisements Synopsis
 - Addendums
 - Shortlists & Awards
 - Solicitation Requirements
 - Current Disbarred List
 - Current Disqualified List
 - Current Email List
 - Business Card
 - Invoice Information
 - Engineering Contract Information
 - Professional Services Contract Information
 - General Information
 - Consultant Contract Services (CCS) Manual
 - Standard Forms
 - Frequently Asked Questions (FAQ)
 - Links to related web sites



- As-Is DOTD Portal for Construction Letting Information

Construction Letting Information



Electronic Bidding Information

Special Announcements

Notice to Contractors

ADVERTISEMENT



Online Bidder Registration

DOTD's Plans Room

Addenda

Information Only Bidders

Prospective Bidder List

Apparent Bid Results

Bid Results

Bid Tabulations

DBE Directory for Federal Aid Projects



- As-Is DOTD Portal for Construction Letting Information

DBE Directory for
Federal Aid Projects

- [Monthly Price Indices for Asphalt Cement and Fuel](#)
- [List of Active Contractors \(view html\) \(download - comma delimited\)](#)
- [Ready, Willing, & Able Firms](#)

OJT Forms

- [Contractor OJT Enrollment Form](#)
- [Contractor OJT Change Form](#)
- [Contractor Weekly OJT Report](#)

Subcontractors Forms

- [Request to Sublet and Extract of Subcontract \(Form OMF-1A\)](#)
- [Subcontractor's EEO Certification \(Form OMF-2A\)](#)
- [Bidders Assurance of DBE Participation \(Form CS-6AAA\)](#)
- [Contractor's Monthly DBE Participation \(Form CP-1A\)](#)
- [DBE Final Report \(Form CP-2A\)](#)

- [State Transportation Improvement Program \(STIP\)](#)
- [Projects Let in the Past Year](#)

Standard Item File - Weighted Unit Price

- 2000 Specs**
 - (English) [View](#) [Download](#) (revised 07/18/2008)
 - (Metric) [View](#) [Download](#) (revised 07/18/2008)
- 2006 Specs**
 - (English) [View](#) [Download](#) (revised 07/18/2008)
 - (Metric) [View](#) [Download](#) (revised 07/18/2008)



As-Is DOTD Portal for Consultant Contract Services

Consultant Contract Services						
Advertisements	Advertisements & Addendums listed by Advertisement Date and Lead Project No.					
	Date	Project No.	Document	Project Name	Parish(es)	Closing Date
	10/10/2008	713-05-0106	Advertisement	Roy/Gaspard Bridge	Avoyelles	11/10/2008
All Postings	10/10/2008	742-36-0138	Advertisement	Magazine Street Rehabilitation	Orleans	11/10/2008
Synopses	09/19/2008	700-19-0110	Advertisement	Off-System Highway Bridge Proram In E.Feliciana Parish (Hb46)	East Feliciana	10/20/2008
Addendums	09/19/2008	700-24-0031	Advertisement	Mississippi River Bridge (Baton Rouge) (Cleaning & Painting)	East Baton Rouge	10/20/2008
Shortlists & Awards	09/19/2008	700-24-0031	Adden. No. 2	Mississippi River Bridge (Baton Rouge) (Cleaning & Painting)	East Baton Rouge	11/03/2008
Return to CCS Menu	09/19/2008	742-36-0123	Advertisement	Woodland Drive Rehabilitation General Degaulle Drive To Tullis Drive	Orleans	10/20/2008
	08/22/2008	737-99-0927	Advertisement	Specific Service (Logo) Signing Program	Statewide	09/15/2008
	08/22/2008	737-99-0927	Adden. No. 1	Specific Service (Logo) Signing Program	Statewide	09/22/2008
	08/15/2008	700-99-0462	Advertisement	Professional Services Engineering Support	Statewide	09/02/2008
	08/15/2008	700-99-0462	Adden. No. 1	Professional Services Engineering Support	Statewide	09/08/2008



As-Is DOTD Portal for Consultant Contract Services

[Advertisement Synopsis](#)

ENGINEERING AND RELATED SERVICES
September 19, 2008

STATE PROJECT NO. 700-19-0110 (OSBR)
H. B. 46 APPROPRIATION
FUNDING AUTHORIZATION 08/362
OFF-SYSTEM HIGHWAY BRIDGE PROGRAM
EAST FELICIANA PARISH



700-19-0110.pdf

ENGINEERING AND RELATED SERVICES

September 5, 2008

STATE PROJECT NO. 700-19-0110

H. B. 46 APPROPRIATION

FUNDING AUTHORIZATION 08/362

OFF-SYSTEM HIGHWAY BRIDGE PROGRAM

EAST FELICIANA PARISH

Under Authority granted by Title 48 of Louisiana Revised Statutes, the Louisiana Department of Transportation and Development (DOTD) hereby issues a Request for Qualification Statements (RFQ) on Standard Form 24-102 (SF 24-102), "Professional Engineering and Related Services", revised January 2003, from Consulting Firms (Consultant) to provide engineering and related services. **All requirements of Louisiana Professional Engineering and Land Surveying (LAPELS) Board must be met at the time of submittal.** One Prime-Consultant/Sub-Consultant(s) (Consultant/Team) will be selected for this Contract. A map of the project limits for the proposed work is available upon request.

Project Manager – Mr. Gary Pentek may be reached at (225)379-1047.



SAP Concepts



SAP Glossary

- **Attribute** – A property or value that describes and defines an object or an entity in detail (blonde hair, blue eyes, 5'2" tall, 120 lbs...are all attributes of a human)
- **Client** – A grouping or combination of legal, organizational, business and/or administrative units with a common purpose; a self-contained unit in an SAP system with separate master records and its own set of tables ("The State of Louisiana")
- **Company Code** – This level represents an independent accounting unit within a client. Each company code has its own balance sheet and its own profit and loss statement. Example : a subsidiary company, member of a corporate group ("The State")
- **ECC** – Enterprise Central Component (the core SAP system where financials and most logistics transactions are processed)
- **Matchcode** – A search technique which enables a user to locate a particular database record (such as an account number or material master record) by entering information contained in the record (Key word Search)
- **Reconciliation Account** – A G/L account to which transactions in the subsidiary ledgers (such as in the customer, vendor, or assets areas) are updated automatically
- **Dunning** – A reminder or warning letter used to remind vendors to deliver the material from the purchase orders.



SAP Glossary (continued)

- **Minority indicator** – A business that is owned and controlled by one or more socially and economically disadvantaged persons
- **Tolerance Group** – It is a percentage or a value that is the limit to which an event can deviate
- **Partner Functions** – A term, such as "sold-to party" or "payer", that describes a person or organization with whom you do business
- **Invoice verification** – A term that describes the entering and checking of incoming (vendor) invoices
- **Account Groups** – An object that attributes that determine the creation of master records
- **Flagging for deletion** – A label that identifies a data record to be deleted from the database
- **AVL (Approved Vendor List)** – Object in SAP for source determination which identifies vendors approved to supply specific commodities and services.
- **Purchasing Organization** – An organizational unit in Logistics, subdividing an enterprise according to the requirements of Purchasing



SAP Glossary (continued)

- **Supplier Self Service (SUS)** – The SAP web based application which enables vendors to self register with the state, view purchase orders, respond to purchase orders, enter confirmations, enter invoices and view the status of supplied services and/or commodities
- **Supplier Relationship Management (SRM)** – The SAP application which enables the procurement process via an web enabled user interface
- **Supplier Screening** – The list of suppliers that have registered to supply items awaiting analysis and approval. They are not seen in the procurement processes until they are approved by the buyer
- **Supplier** – The listing of suppliers that have been accepted as qualified sources of supply for goods and services in SAP SRM
- **Shopping cart** – The object in the SRM application leveraged for the requisition data. This document is what is created by the requisitioner in the application to create requests for procurement.
- **Buy on Behalf Of (BOBO)** – SAP term describing the entry of a shopping cart on behalf of another user. This is performed by the secretary in the SRM system.
- **Confirmations** – The goods receipt function in SRM
- **Workflow** – The SAP functionality for online distribution of electronic documents for approval/review.



SAP Glossary (continued)

- **Spending Limit** – The total dollar amount of a request that an end user can create in the SRM system which would not require an approval/review.
- **Approval Limit** – The total dollar amount of a request that an end user approver has authorization to approve/review a request in SRM.
- **Substitution** – The ability in SRM to create a temporary substitute for an approver user with another system approver user. This is to facilitate the idea of an approver going on vacation.
- **Approver** – End user in the SRM system which is responsible for approving or rejecting procurement documents (i.e. shopping cart, confirmation, invoices etc.)
- **Requester** – End user in the SRM system which creates requests for procurement (shopping carts).
- **Skip Level Approval** – Approval process which requires that only the approver with the appropriate approval limit performs the approval of the purchasing document (i.e. the document would skip over the lower level approvers and only be submitted to the one approver with the appropriate approval limit of that specific purchasing document).
- **Parallel Approval** – The approval process where the document is sent to several approvers simultaneously and requires that only one of the approvers actually approves the document. When the document has been approved by one of the approvers, the document is then removed from all the other approver inboxes.



SAP Glossary (continued)

- **Portal** – The central website for posting of information, data, or documents on the internet.



RFQs/OAs Portal Options

1. Leverage current portals in the LaGov solution.
 - Interface the RFQ and Contract applications in SAP to the current portal applications (i.e. eCat and LaPac)
 - What other functionality would require interfaces back to LaGov procurement systems?
2. Replace the current legacy portals solutions.
 - Leverage MDM for Catalog data
 - Need new portal for RFQ posting of data
 - What functionality would be needed for the two applications?



Review of SAP Concepts



Questions?

