

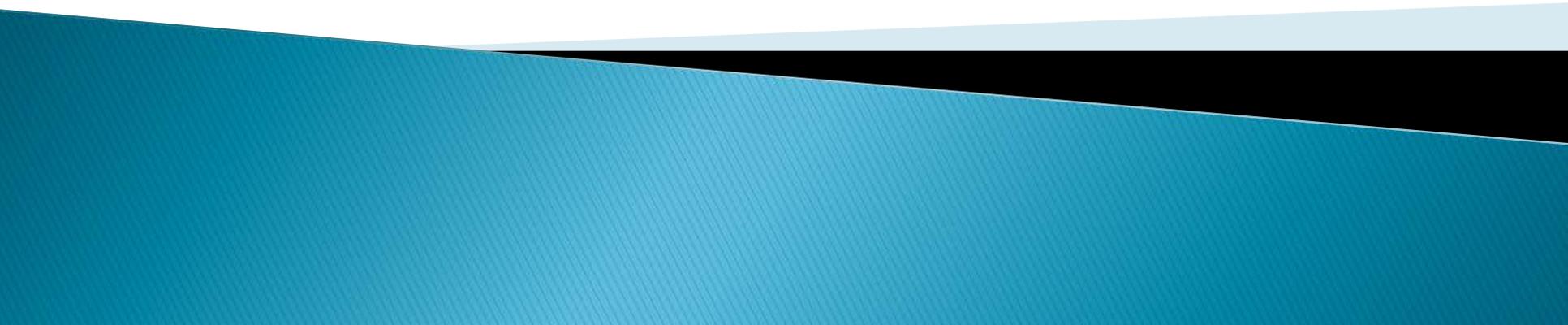
# Spring Procurement Forum Agenda at-a-Glance

- ▶ Governor's Office and DIS Pre-Solicitation Approval
- ▶ Procurement Legislation Update
- ▶ New RFP/RFQ Scoring Process
- ▶ AASIS Purchase Requisition eLearning Course
- ▶ AASIS Information
  - Material Search Screen Changes
  - Illegal Immigrant Certificates
  - Requisition Report – Transaction Code ZMM16

# Governor's Office and DIS Pre-Solicitation Approval

## Procurement Legislation Update

Camber Thompson



# Special Note

- ▶ Procedures will be issued in the near future for the Governor's Office and DIS Pre-Solicitation Approval.



# Procurement Legislation Update

- Act 281 (HB1278) effective 90 days after sine die.
- Act 557 (SB476) effective August 1, 2015.
- Act 686 (HB1399) effective 90 days after sine die.
- Act 966 (HB1997) effective 90 days after sine.
- Act 1287 (SB1039) effective 90 days after sine.

# Act 28 I: Experience of Offerors

- If a bid includes a requirement for a bidder or offeror to have a certain level of experience the agency will allow the following to qualify:
    - The amount of experience of the bidder or offeror. A bidder or offeror may use the combined experience of its owners or senior executive staff to satisfy the requirement.
- OR
- The combined amount of experience of the key personnel of the bidder or offeror that will be responsible for satisfying the requirements of the contract to be procured.

# Act 28 I: Experience of Offerors

- If the agency, prior to the release of a bid, determines in writing that the combined experience of the key personnel would be insufficient to adequately satisfy the requirements of the bid the following is required:
  - A written description of the products or services the agency seeks to procure; and
  - A detailed statement of the reasons the combined experience of the key personnel of a bidder or offeror would be insufficient.
  - Include a statement in the bid that only the experience of the bidder or offeror shall be considered.
- Effective 90 days after sine die.

# Act 557: Various Procurement Laws

- Section 4 requires all purchases made from cooperative purchasing agreements be reported quarterly to the Legislative Council.
  - Agencies will be required to utilize the OA numbers listed on the OSP website and tie Purchase Requisitions and PO's to those OA's.
  - OSP hopes to utilize AASIS for reporting functionality. Higher Education will also be required to report their purchases to OSP and this may be done through a standard template that could be uploaded to AASIS.

# Act 557: Various Procurement Laws

- Section 5 requires technical and general service contracts with a total projected cost of \$100,000 or more be reviewed by the Legislative Council prior to contract execution.
  - Total projected cost includes the total initial contract amount and any possible amendments and extensions.
  - OSP envisions a process similar to PCS will be implemented.
- Section 5 also requires technical and general services contracts with a total projected cost of at least \$25,000 to \$99,999.99 be reported monthly to the Legislative Council.
  - OSP envisions a process similar to PCS reporting will be implemented.

# Act 557: Various Procurement Laws

- Section 6 and 8 requires vendor performance reports to be completed for all contracts (term/firm) where the total projected cost is at least \$25,000.
  - VPR's will be submitted quarterly during the term of the contract and at the end of the contract.
  - VPR must be signed by the agency director or designee.
- VPR's must be submitted to OSP.
  - Submission will either be portal or email based.
  - Envision development of a reminder tool to aid agencies in submitting VPR's timely.

# Act 557: Various Procurement Laws

- Section 6 requires agencies to submit documentation to the Office of Intergovernmental Services for the following IT purchases:
  - Bids with a total projected cost of \$100,000 or more.
  - Purchases from a cooperative contract with a total projected cost of \$100,000 or more.
  - Agencies will be required to attach the IT plan letter from IGS to their requisition.
    - OSP will review to ensure the IT letter is attached.

# Act 557: Various Procurement Laws

- Section 6 sets forth those convicted of purposeful violation of the procurement law will be guilty of a Class D felony.
- Section 6 requires agencies to include performance based standards in all contracts defined under subchapter 2.
  - Currently, agencies must include performance based standards in PCS contracts.
  - An NIGP class will be held on May 14 regarding this topic. Space is limited so if interested please contact Terrance Farmer for registration information.

# Act 557: Various Procurement Laws

- Section 7 amends the dollar threshold for submittal of PCS contracts for Legislative Council review.
  - New threshold is \$50,000 or more total projected cost.
- Section 7 also amends the dollar threshold for reporting PCS contracts to Legislative Council.
  - New threshold is \$10,000 to \$49,999.99 total projected cost.
- OSP will modify the existing portal to accommodate these changes.
- Effective August 1, 2015.

# Other Acts

- Act 686 allows Higher Education an exemption from M&R regarding the sale of plants and animals if proceeds are used solely for agricultural research, extension, or teaching programs.
  - Effective 90 days after sine die.
- Act 966 amends 19-11-709 (d)(1) regarding selling to the state after termination of employment.
  - Defines last annual salary as the state fiscal year.
  - Increases salary to \$15,000
  - Effective 90 days after sine die.
- Act 1287 adds additional requirements regarding conflict of interest for board members.
  - Effective 90 days after sine die.



**Questions?**

# Scoring Proposals

Kelley Kelley

# Old Method of Scoring

- ▶ Determine the Grand Total Score  
*Example: 1,000 points*
- ▶ Determine the total points available for the Technical Proposal & Cost  
*Example: Technical Proposal = 700 pts (70%) / Cost = 300 pts (30%)*
- ▶ The total points available for the Technical Proposal is broken down into broad groups containing various pieces of evaluation criteria

## Example

1. Vendor Background/Experience	75 pts
2. Implementation Schedule	75 pts
3. Project Approach / Management	200 pts
4. Proposed System	200 pts
5. Training	<u>150 pts</u>
	700 pts

# Old Method of Scoring

## THE TECHNICAL EVALUATION

- ▶ Deduction of points ONLY
- ▶ Points CANNOT be given for exceeding specifications, for exceptional qualifications, etc.

### Example:

1. <u>Vendor Background/Experience</u>	125 pts
▶ Vendor has no experience working with State agencies	-20 pts
▶ Vendor has limited experience working with projects as large as the one described in the bid	-25 pts
▶ Vendor didn't include a listing of offices and locations	<u>-5 pts</u>
	75 pts

# New Method of Scoring

- ▶ Determine the Grand Total Score  
*Example: 1,000 points*
- ▶ Determine the total points available for the Technical Proposal & Cost  
*Example: Technical Proposal = 700 pts (70%) / Cost = 300 pts (30%)*
- ▶ Determine the Maximum Weighted Score Possible for each sub-section of the Evaluation Information section of the bid solicitation

## Example

1. Vendor Background/Experience	10%
2. Implementation Schedule	10%
3. Project Approach / Management	30%
4. Proposed System	30%
5. Training	<u>20%</u>
	100%

- ▶ Determine the Maximum Number of RAW Points Possible for items in Evaluation Information section of the bid solicitation

# Example

## Maximum Number of RAW Points Possible

	<u>Max RAW Points Avail.</u>
1. <u>Vendor Background/Experience</u>	
A. Describe your company's experience working with State or Federal agencies	5 pts
B. Provide a list of your satellite offices and their locations.	5 pts
C. Provide a brief company history including the following information:	
i. Experience working with the public sector client base.	5 pts
ii. Number of years your company has worked in this field.	5 pts
D. Provide a list of staff who will be dedicated to this project, including	5 pts
i. Job Titles	
ii. Employee Experience with similar projects	
F. Provide a brief description of three projects for which your company has provided services of similar scope and size as those described in this RFP.	<u>5 pts</u>
Total Maximum RAW Points Available for Sub-Section 1	30 pts

# New Method of Scoring

## THE TECHNICAL EVALUATION

- ▶ Points can be deducted.
- ▶ Points CAN be given for exceeding specifications, for exceptional qualifications, etc.
- ▶ Evaluator's comments not required for an Adequate score.

<u>Points</u>	<u>Description</u>	<u>Comments Required</u>
0	Information Omitted	Yes
1	Poor	Yes
2	Below Average	Yes
3	Adequate	No
4	Good	Yes
5	Exceptional	Yes

# Weighted Score

The following formula is used to determine the weighted score:

**Formula:  $(A/B) * C = D$**

A = Actual raw score for sub-section

B = Maximum raw score possible for sub-section

C = Maximum weighted score possible for sub-section

D = Weighted score received for technical proposal

## Worksheet - Weighted Scores

1. Enter percentage weight for technical proposal. (e.g., Technical - 70%, Cost - 30%)
2. Enter maximum raw score for each sub-section of the *Information for Evaluation* section of the RFP.
3. Enter weights for sub-sections.

Maximum Weighted Scores		
	%	Points
Technical	70%	700
Cost	30%	300
Grand Total	100%	1,000

**Formula:  $(A/B)*C = D$**

A = Actual raw score for sub-section

B = Maximum raw score possible for sub-section

C = Maximum weighted score possible for sub-section

D = Weighted score received for technical proposal

<b>Example : Determining Maximum Weighted Scores for Sub-Sections</b>			
Sub-Section	Maximum RAW score	*Sub - Section Weights	Maximum Weighted Score
1	30	10%	70.0
2	50	10%	70.0
3	200	30%	210.0
4	150	30%	210.0
5	75	20%	140.0
<b>Total</b>	505	100%	700.0

<b>Example: Calculating Weighted Score</b>			
A. Evaluator's RAW Score	B. Maximum RAW score	C. Maximum Weighted Score	D. Weighted Score Received
20	30	70	46.67
30	50	70	42.00
165	200	210	173.25
100	150	210	140.00
50	75	140	93.33
365.00	505	700	<b>495.25</b>

**\*Sub-section weights must equal 100%**

## Worksheet - Weighted Scores

1. Enter percentage weight for technical proposal. (e.g., Technical - 70%, Cost - 30%)
2. Enter maximum raw score for each sub-section of the *Information for Evaluation* section of the RFP.
3. Enter weights for sub-sections.

Maximum Weighted Scores		
	%	Points
Technical	70%	700
Cost	30%	300
Grand Total	100%	1,000

**Formula:**  $(A/B)*C = D$

A = Actual raw score for sub-section

B = Maximum raw score possible for sub-section

C = Maximum weighted score possible for sub-section

D = Weighted score received for technical proposal

<b>Example : Determining Maximum Weighted Scores for Sub-Sections</b>			
Sub-Section	Maximum RAW score	*Sub - Section Weights	Maximum Weighted Score
1	30	10%	70.0
2	50	10%	70.0
3	200	30%	210.0
4	150	30%	210.0
5	75	25%	175.0
<b>Total</b>	505	105%	735.0

<b>Example: Calculating Weighted Score</b>			
A.	B.	C.	D.
Evaluator's RAW Score	Maximum RAW score	Maximum Weighted Score	Weighted Score Received
20	30	70	46.67
30	50	70	42.00
165	200	210	173.25
100	150	210	140.00
50	75	175	116.67
365.00	505	735	<b>518.58</b>

**\*Sub-section weights must equal 100%**

# Contact Information

- ▶ Kelley Kelley, CPPO, CPPB
- ▶ [kelly.kelley@dfa.arkansas.gov](mailto:kelly.kelley@dfa.arkansas.gov)
- ▶ 501-324-9316 or 501-371-6070

# AASIS Purchase Requisition eLearning Course

Edith Crowell

# Agenda



- ❑ Support Material
- ❑ ESS Portal Learning Tab
- ❑ Course Navigation

# Support Material Website

<http://learn.arkansas.gov>

Materials Management → Procurement → Purchase Requisitions

The screenshot shows the DFA Learn website interface. At the top, there is a dark blue header with the 'DFA Learn' logo on the left and a search bar with a 'Go' button on the right. Below the header, there are navigation links for 'Projects', 'Up', and 'Home', and a 'Welcome, Zack' message. The main content area is titled 'DFA Training and Support Documentation'. It contains a paragraph explaining that training and reference materials are available in various areas. Below this, there is a list of 'Areas' with expandable arrows: AASIS New Users, Accessibility Customizations, Finance, General, Human Capital Management, LSO Learning Solution, Materials Management, Planning, Budget and Admin Systems, and Plant Maintenance. There is also a 'Help Content' section with expandable arrows for 'Course Catalog Quick Reference' and 'Training Registration Form'. A 'Show Filtered Documents' dropdown menu is visible. At the bottom, a breadcrumb trail reads 'Context: uPerform Group Memory > DFA Training and Support Documentation'.

# Registration

<https://www.ez.arkansas.gov>

OPM Training

OSP Training

AASIS Login and Password required.

# Book this course

## Static Web-Based Training : Purchase Requisition Training :

[Course Catalog](#) > [Self-paced Online](#) > [Procurement](#) > Purchase Requisition Training

Your booking was canceled.

### Course Content

This course is intended for state employees that are responsible for creating purchase requisitions in AASIS.

In this course, you will learn the critical procedures you need to follow when creating a purchase requisition.

### Fee

Free of Charge

### Course Languages Available

- English

### Book

The results of the availability check indicate that you can book this course.

Book this course

Book this course

# Start Course Now

**Static Web-Based Training : Purchase Requisition Training :**

[Course Catalog](#) > [Self-paced Online](#) > [Procurement](#) > Purchase Requisition Training

Participation was successfully booked.

**Start Course Now**

**Course Description**

This course is designed to be self-paced and available for creating purchase requisitions.

In this course, you will learn the critical procedures you need to follow when creating a purchase requisition.

**Course Duration**

The course is licensed from 04/20/2015 to 12/31/9999.

**Fee**

Free of Charge

**Learning Progress**

Booking Date
Course is licensed as of

**Start Course**

**Start Course Now**

Start Course Now

# Course Navigation

**Purchase Requisition Training**

Start

Start

RWD  
uPerform

1) Enter your business area, your full name and AASIS personnel number. Example: 0610 Jane Doe 99999 2) Click the ARROW next to the name field. 3) Click Launch Certification Activity:

Date Published Thursday, April 16, 2015

If you are experiencing difficulties viewing this course, please open the Adobe Flash Player Global Security Settings Panel and select the **Always allow** option.

Follow Instructions

The screenshot shows a course interface for 'Purchase Requisition Training'. At the top right, there is a yellow callout bubble labeled 'Start' pointing to a red-bordered button labeled 'Start'. Below this, the course title 'Purchase Requisition Training' is displayed in a large, light blue font. Underneath, there is a search or input field with a red border, containing instructions: '1) Enter your business area, your full name and AASIS personnel number. Example: 0610 Jane Doe 99999 2) Click the ARROW next to the name field. 3) Click Launch Certification Activity:'. Below the instructions is a white input field with a small blue arrow icon to its right. A yellow callout bubble labeled 'Follow Instructions' points to this input field. At the bottom of the interface, the 'Date Published' is listed as 'Thursday, April 16, 2015'. A footer note at the very bottom states: 'If you are experiencing difficulties viewing this course, please open the Adobe Flash Player Global Security Settings Panel and select the **Always allow** option.'

# Course Navigation

Content Player Controls

The screenshot shows a web browser window titled "Purchase Requisition Training - Windows Internet Explorer". The page header includes the DFA logo and the text "PURCHASE REQUISITION TRAINING". A navigation bar contains buttons for "Menu", "Glossary", "Help", and "Exit". The main content area is titled "PAGE 5 OF 53: OBJECTIVES" and "Course Objectives". It features a "Content Window" with an image of a magnifying glass over the word "objective" and a list of five objectives. At the bottom, a progress bar shows 9% completion, and a control bar includes "Audio Enabled", a timer, and "Back / Next Page" buttons.

Purchase Requisition Training - Windows Internet Explorer

DFA

PURCHASE REQUISITION TRAINING

Menu | Glossary | Help | Exit

PAGE 5 OF 53: OBJECTIVES

Content Window

### Course Objectives

Upon completing this course, you should be able to:

- Explain the role of the purchase requisitioner in the procurement process
- Create a purchase requisition
- Create a purchase requisition with reference to an existing purchase requisition
- Create a purchase requisition with reference to a state term contract
- Initiate the purchase requisition approval process (workflow)

Progress 9%

Audio Enabled 00:00 / 00:00

Back Next

100%

Back / Next Page

# Practice!

Purchase Requisition Training - Windows Internet Explorer

**DFA** Menu Glossary Help Exit

**PURCHASE REQUISITION TRAINING**

PAGE 34 OF 53: CREATE PURCHASE REQUISITION

Let's create a purchase requisition using simplified screens.

Click the **Let Me!** button below to launch the Simulation.

Click the **Next** button after you have reviewed the Simulation to advance to the next page in this eLearning.

**Let Me!**

Plays System Simulation

Next to Proceed

Progress 64% Audio Enabled 00:00 / 00:00 Back Next 100%

# Practice!

The screenshot shows the SAP ME51N 'Create Purchase Requisition' interface. The title bar reads 'Create Purchase Requisition (ME51N) without Reference using Simplified Screens - Windows Internet Explorer'. The menu bar includes 'Purchase Requisition', 'Edit', 'Environment', 'System', and 'Help'. The toolbar contains various icons for document actions. The main area features a 'Document Overview On' section with 'Hold', 'Personal Setting', and 'Easy Screen Off' options. A dropdown menu for 'Req to PO' is open, showing options: 'Req to PO', 'Req to OA', 'Req to PO', 'Req to Prof Svc OA', and 'Req to Prof Svc PO'. A white callout box points to the dropdown with the text: 'Select the appropriate Document Type. In this example, Req to PO is selected.' Below this, a green information box contains the following instructions:

Use the following Document Types as needed:

- If the PR will be used in creating a Purchase Order (PO) select **Req to PO**.
- If the PR will be used in creating an Outline Agreement (OA) select **Req to OA**.
- If the PR will be used in creating a PO for professional services click **Req to Prof Svc PO**.
- If the PR will be used in creating an OA for professional services click **Req to Prof Svc OA**.

The main table has columns: Short Text, Quantity, Unit, C, Delivery Date, Matl Group, Matl Group, Plant, Stor. Loc., PGr, Requirn., and Tr. The 'Item' field at the bottom is set to 'New Item'. The status bar at the bottom shows 'ME51N | saped | OVR' and 'Step 9 of 38'.

# Assessment

- ❑ Six question assessment
- ❑ Given credit on AASIS profile
- ❑ PDF version of course material available to reference while completing assessment

# AASIS Material Master Search Screen

Randy Wright

# AASIS Material Search Screen

## Note the Differences

Restrict Value Range

W: Plant Material by Description M: Material Number/Material Description

Material [ ] →

Language Key = EN →

Material Group [ ] →

Material Type [ ] →

DF at client level = [ ] →

Material description [ ] →

Restrict number to 1500  No restriction

Current Screen

Restrict Value Range

W: Plant Material by Description M: Material Number/Material Description

Material description [ ] →

Material Number [ ] →

Material Group [ ] →

Material Type = GDSV →

DF at client level = [ ] →

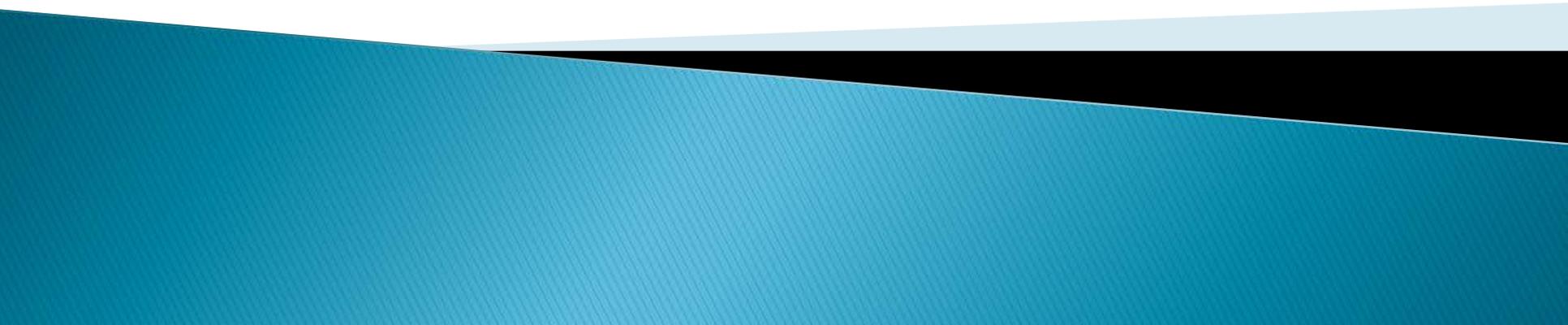
Restrict number to 1500  No restriction

Language Key field is hidden

Future Screen

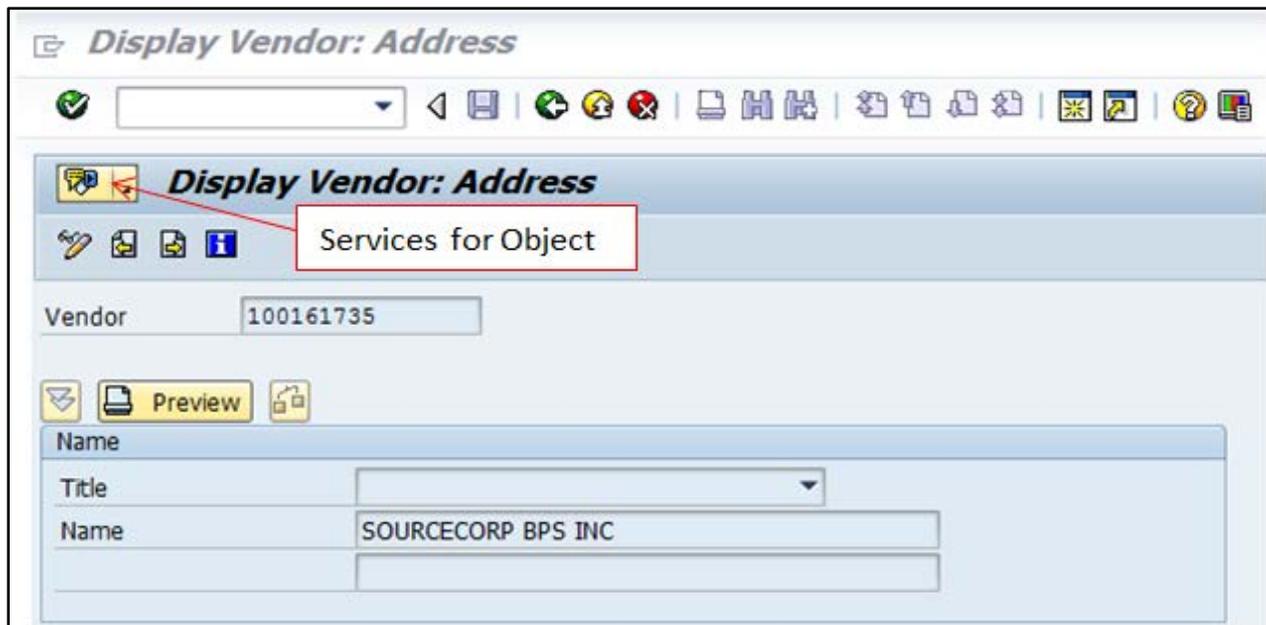
# Accessing Illegal Immigrant Disclosure Certificates

Randy Wright



# AASIS Display Vendor – XK03

- ▶ Access transaction XK03 – Display Vendor
- ▶ Enter the vendor number
- ▶ Click on the Services for Object drop down

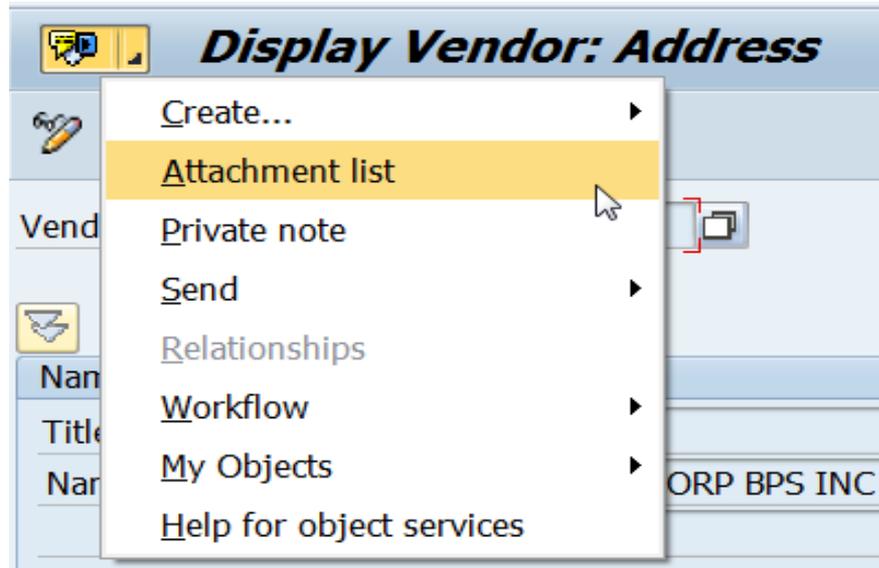


The screenshot displays the SAP 'Display Vendor: Address' transaction. The title bar shows 'Display Vendor: Address'. Below the title bar is a toolbar with various icons. The main area has a header 'Display Vendor: Address' with a dropdown arrow. A red box highlights the 'Services for Object' dropdown menu. Below this, the 'Vendor' field contains the number '100161735'. There are 'Preview' and 'Print' buttons. The main data area shows a table with columns for 'Name', 'Title', and 'Name'. The first row shows 'SOURCECORP BPS INC' in the 'Name' column.

Name	Title	Name
SOURCECORP BPS INC		

# Displaying the Certificate

- ▶ Select Attachment list from the drop down menu



# Displaying the Certificate

- ▶ Double click on the document titled Illegal Immigrant Form to open the form submitted by the vendor.

Service: Attachment list

AttachmentForSOURCECORP BPS INC

Icon	Title	Creator Name	Created On
	Illegal Immigrant Form_Valid thru 3-14-16	JENNIFER R OVERST...	03/18/2015

# Displaying the Certificate

- ▶ The document will open.

From:	Illegal Immigrant Form <AASIS-OSP@dfa.arkansas.gov>
To:	carlos.mallen@sourcehov.com
Cc:	
Subject:	Illegal Immigrant Form

<b>DFA Illegal Immigrant Contractor Disclosure Certification</b>	
<b>Illegal Immigrant Form</b>	
<b>Vendor:</b>	SOURCECORP BPS Inc.
<b>Tax ID:</b>	0086
<b>Disclosure Statement:</b>	I certify that I <b>DO NOT</b> employ or contract with an illegal immigrant.
<b>Contact E-mail:</b>	<a href="mailto:carlos.mallen@sourcehov.com">carlos.mallen@sourcehov.com</a>
<b>Submitted on:</b>	03-16-15
<b>Valid through:</b>	03-14-16

# Saving the Certificate

- ▶ Save the document.
- ▶ Submit with contract documentation.

# **New AASIS Report ZMM16 Solicitations by Agency**

Randy Wright

# About the Report

- ▶ Report Name – Solicitations by Agency
  - ▶ Transaction code ZMM16
  - ▶ Date available – May 1, 2015
  - ▶ Live Demo
- 

# Reminders

- ▶ Summer Forum – July 16, 2015
- ▶ Fall Forum – October 15, 2015
- ▶ E-News Sign up
  - OSP website  
<http://www.dfa.arkansas.gov/offices/procurement/Pages/default.aspx>
  - Click on the button  
A blue rectangular button with a gradient background. The text "E-News" is in a bold, dark red font, and "Sign-up" is in a white, cursive font.
  - Fill in the form