DAS
DEPARTMENT OF ADMINISTRATIVE SERVICES

ORPIN Full System Training

Desk Reference Guide

ORPIN Help Desk 503-378-4642
E-mail: info.orpin@state.or.us

Table of Contents

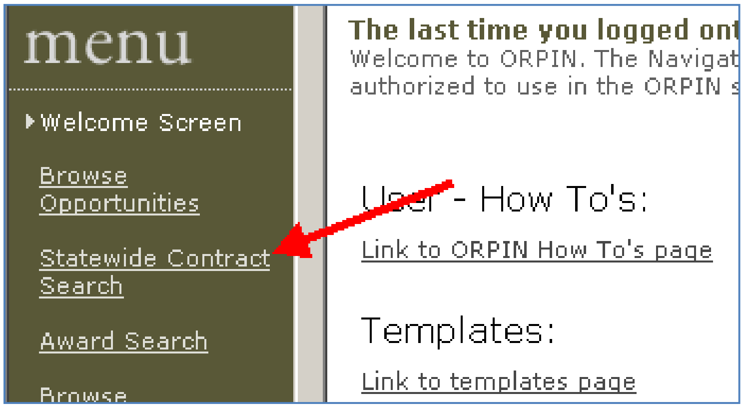
The Supplier Guide to Electronic Bidding is available online at:
http://www.oregon.gov/DAS/EGS/ps/docs/ebid_instructions.pdf

Please add this document as an Attachment on any opportunity where you allow for Electronic Bidding.

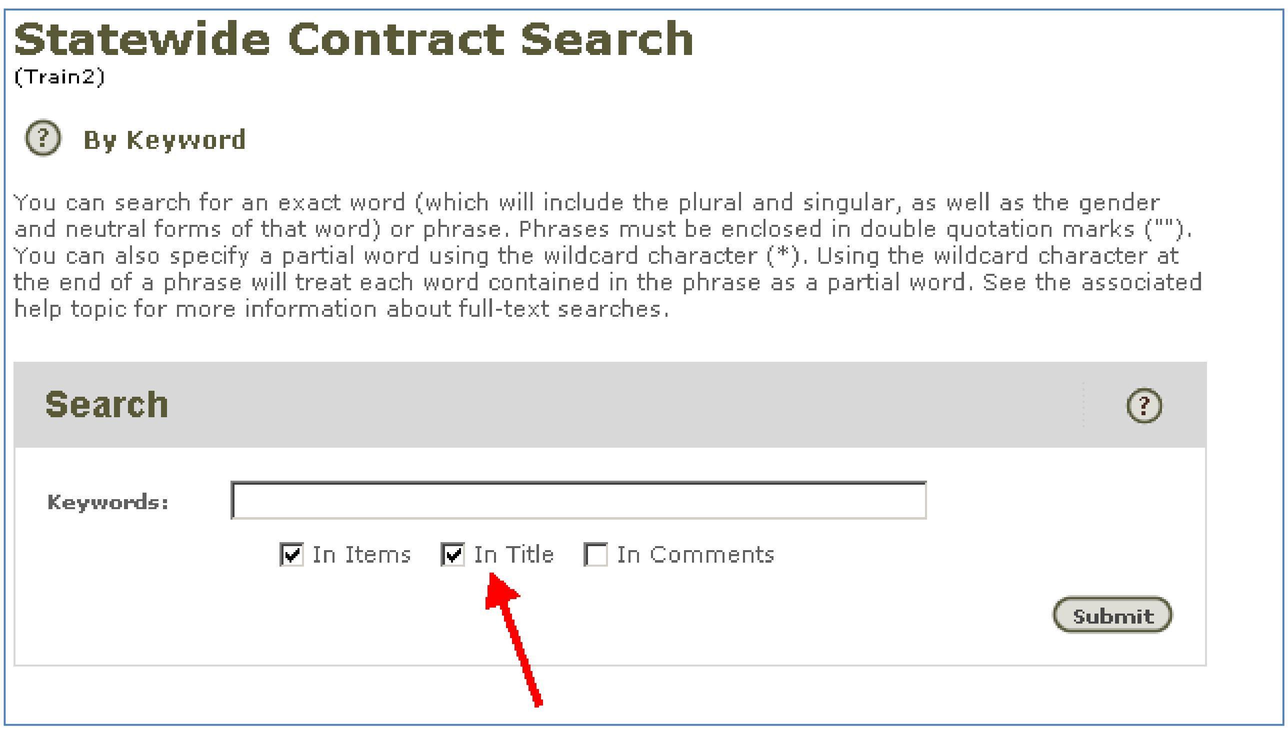
I. Statewide Contract Search:

Use the Statewide Contract Search to find statewide price agreements you may purchase from.

1. Click on **Statewide Contract Search** in the left hand menu bar.



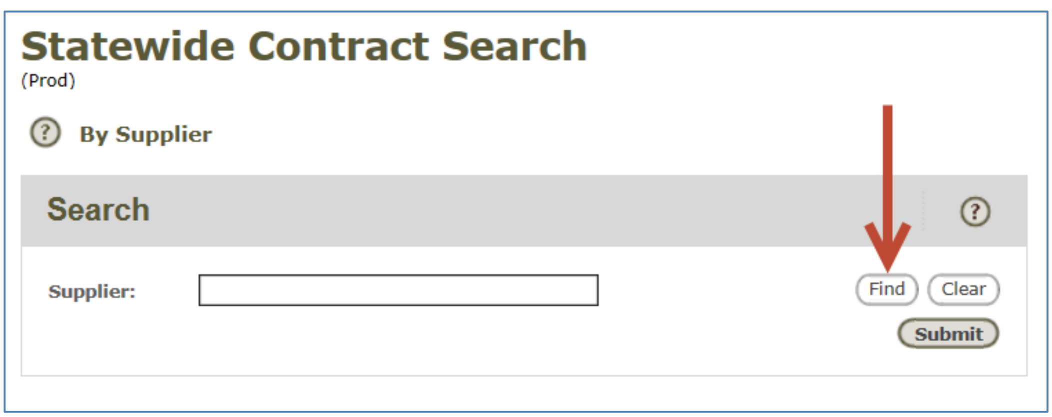
2. Choose how you would like to look for contracts.
    a. To look up contracts by a keyword, choose **By Keyword**.
        i. Notice which boxes are checked under the keyword field. If you want ORPIN to search through contract titles, be sure to check the box **In Title**.



        ii. If you use mutliple words in the **Keywords** field, be aware of using parenthesis and Boolean searches.

b. Searching **By Commodity** will give you a list of the commodity categories that have active contracts under them.

c. **By Organization** sorts the contracts by agency.
d. **By Number** will allow you to search for a specific contract by number.
e. **By Supplier** allows you to search for statewide contracts awarded to a specific supplier. Before searching for contracts, click the “Find” button to search for the correct supplier.



Once you have the correct supplier’s name displayed, hit the **Submit** button to conduct your search.

f. **All Available Contracts** will display all contracts that your agency is authorized to use.
g. **Printable Index** will give you a downloadable report of all statewide contracts.

3. When the results display, you will see several icons. They are:

   a. Click the **View Summary** icon to see a quick description of the contract.
   b. Click the **View Statewide Contract** icon next to the contract number to open the actual contract document screen.

4. Convenience vs. Mandatory – Refer to OAR 125-247-0296 for more information.
5. Buy Decision

Before Solicitation – Buy Decision

1	2	3	4			
Surplus Property	**QRF**	**Inmate Labor**	**Price Agreement**	**IGA**	**Open Market**	**MWESB**
Promotes efficient use of existing resources	Assists individuals with disabilities through gainful employment (Socio-economic)	Oregon Constitution, Article I, Section 41	Promotes economy and efficiency through volume and strategic purchases.	ORS 190 Agreement may be used at any time.	When none of the previous sources apply an Agency may procure Supplies and Services using one of the 7 sourcing methods.	Encouraged at all dollar thresholds and promote balance through inclusiveness.

OAR 125-247-0200

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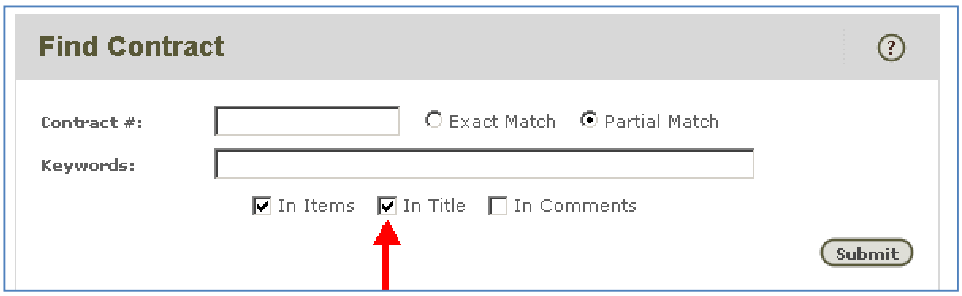
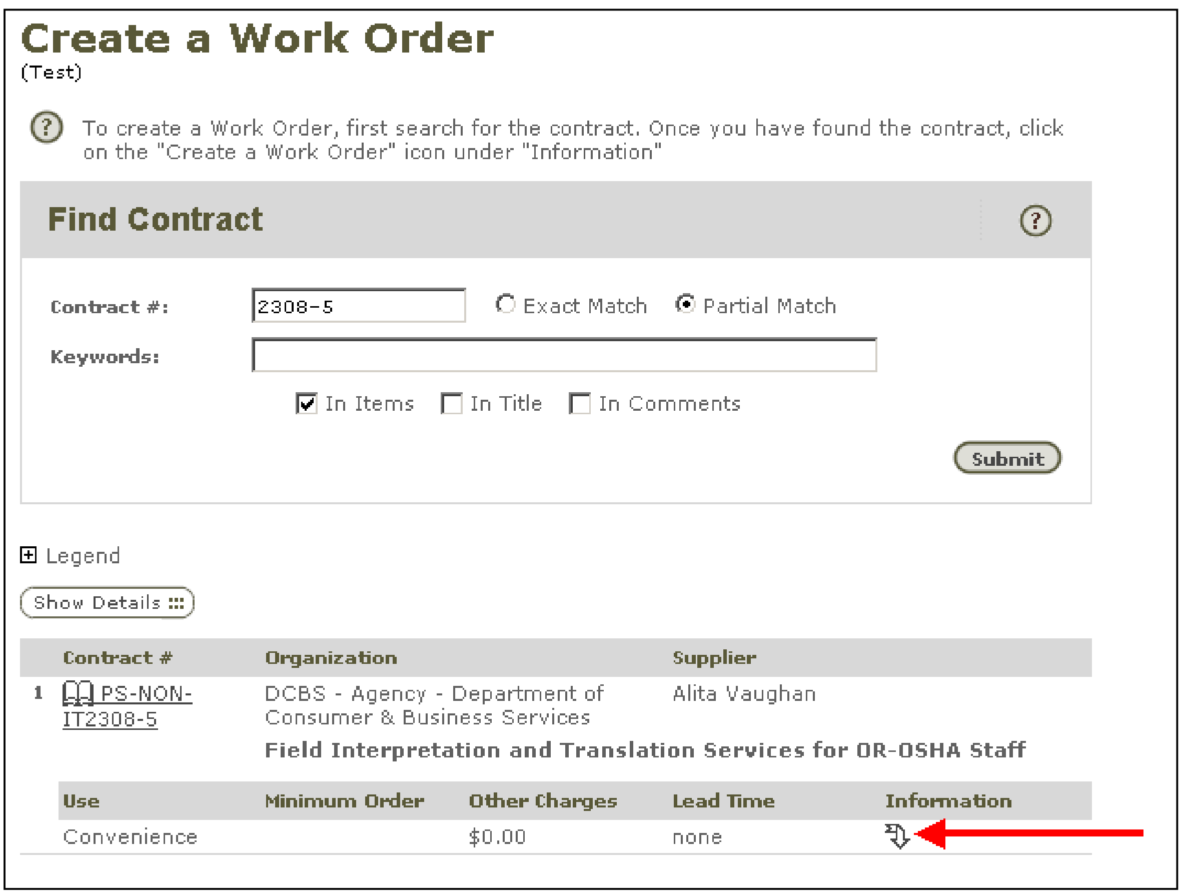
II. Creating a Work Order:

1. Click **Create Documents** in the left hand menu bar.
2. Choose **Create a Work Order**.
3. Search for the contract you want to place the work order against. You can search by a contract number (exact or partial match) or by Keyword. Remember to check the “In Title” box if you want to search for a contract title by keyword.



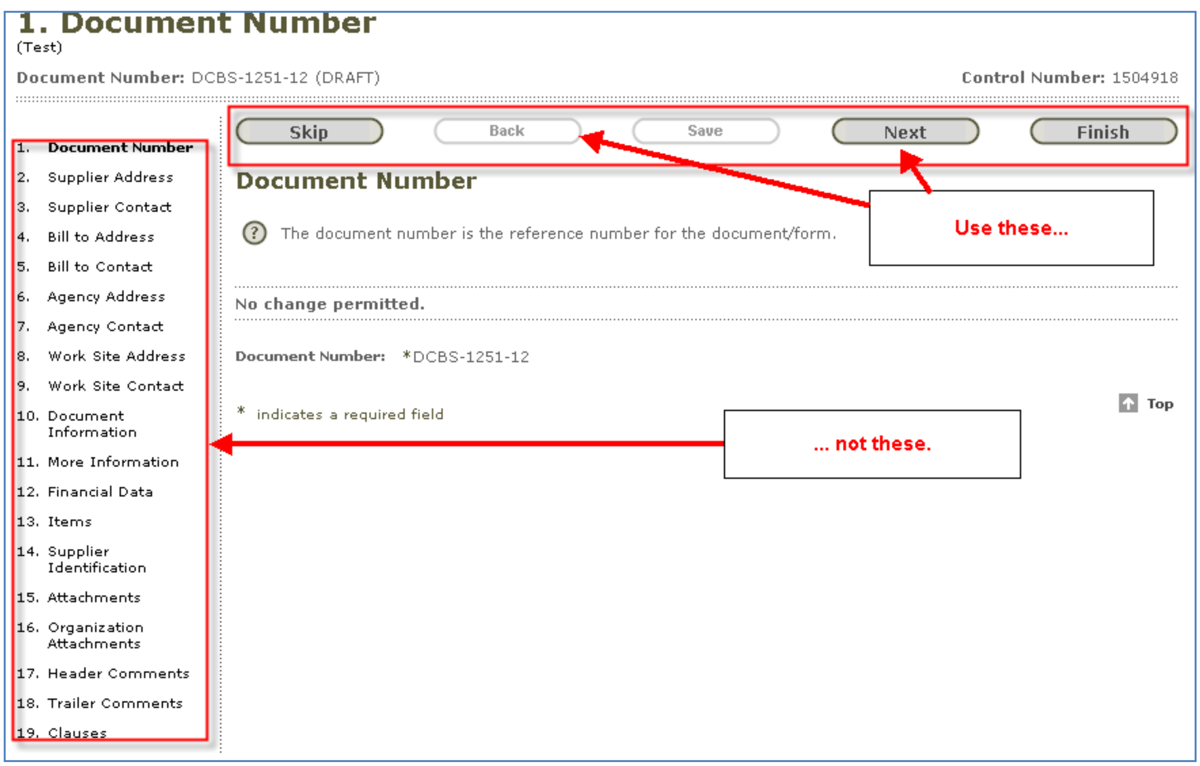
4. Once the results display, simply click on the ribbon next to the contract that you want to start a work order against.



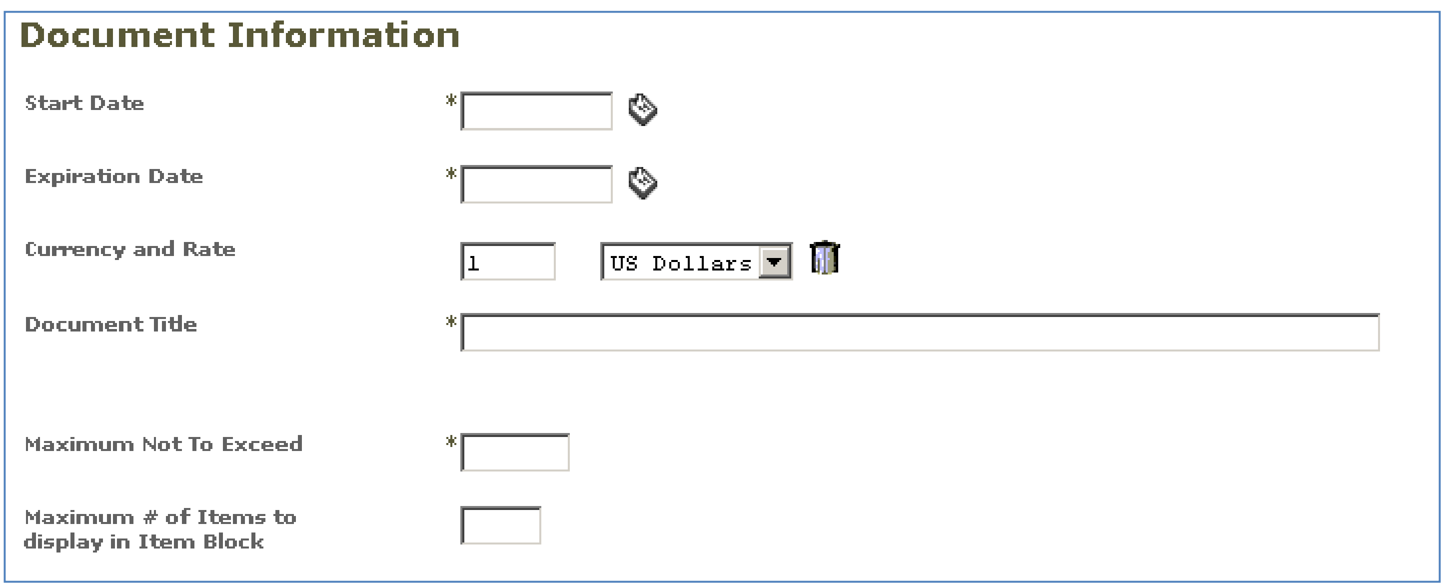
5. Set the Issued By and Issued For agencies.

6. Validate the information displayed on the Additional Information page. (Once you click the Create button, this information cannot be changed.)
7. Click the **Create** button to create the work order document.
8. The Work Order Number will display. Click the **Continue** button to transfer into the Document Wizard, which will help you fill out the necessary information on your work order.

Once you are in the Document Wizard, you will see all of the information screens listed down the left hand side of the window. Do not use these links to navigate from screen to screen, as doing so does not have an 'auto-save' feature so the information you type in will be lost. Instead, move from screen to screen by clicking either the **Back** or **Next** buttons along the top of the window.



9. Fill out all of the required information in the Document Wizard.
    a. **Document Number** – This will display the number automatically assigned when you created the Work Order. Click **Next** to save and continue.
    b. **Supplier Address** – The address should auto-populate based on the information listed on the contract. You shouldn't need to change anything on the address. Click **Next** to save and continue.
    c. **Supplier Contact** – The contact should auto-populate based on the information listed on the contract. You can update it if needed. Click **Next** to save and continue.
    d. **Bill to Address** – The address should auto-populate based on the Issued For agency you selected when creating the Work Order. You can update it if needed. Click **Next** to save and continue.
    e. **Bill to Contact** – Either choose the appropriate Bill To Contact name from the dropdown list or enter a new one in the fields below. Click **Next** to save and continue.
    f. **Agency Address** – The address should auto-populate based on the agency you selected when creating the Work Order. You can update it if needed. Click **Next** to save and continue.
    g. **Agency Contact** – Either choose the appropriate Agency Contact name from the dropdown list or enter a new one in the fields below. Click **Next** to save and continue.
    h. **Work Site Address** – The address should auto-populate based on the agency you selected when creating the Work Order. You can update it if needed. Click **Next** to save and continue.
    i. **Work Site Contact** – Either choose the appropriate Work Site Contact name from the dropdown list or enter a new one in the fields below. Click **Next** to save and continue.
    j. **Document Information** – The required fields are indicated with an asterisk.


Document Information

Start Date *

Expiration Date *

Currency and Rate 1 US Dollars

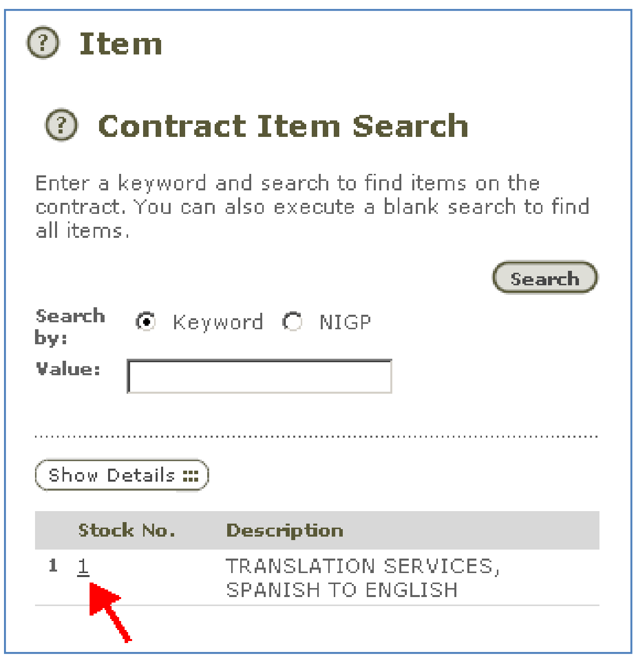
Document Title *

Maximum Not To Exceed *

Maximum # of Items to display in Item Block

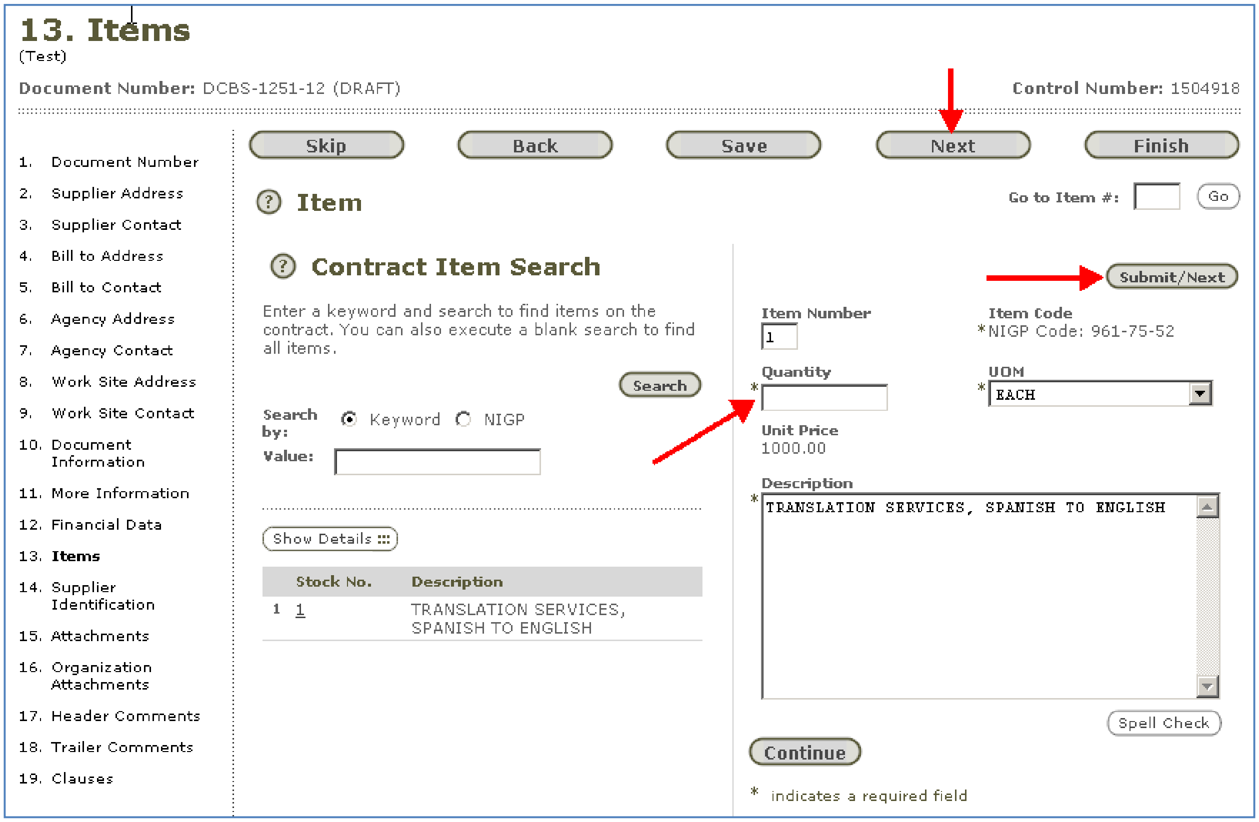
i. **Start Date** – Click the calendar icon to the right of the Start Date field to choose the Work Order's start date.
ii. **Expiration Date** – Click the calendar icon to the right of the Expiration Date field to choose the Work Order's expiration date.
iii. **Document Title** – Enter a title for the Work Order.
iv. **Maximum Not To Exceed** – Enter a maximum dollar amount for the work order not to exceed.
v. Click **Next** to save and continue.

k. **More Information** – The only required field on this page is the **Funding Source** dropdown. However, you may choose to fill out the other fields if you like. Click **Next** to save and continue.
l. **Financial Data** – If you would like to capture your accounting codes for this work order, you may do so here. However these are not required fields so you can skip this page if desired. Click **Next** to save and continue.
m. **Items** – You will only be able to put items on the work order that were listed on the originating price agreement.
   i. To search for the available items, either enter a Keyword or NIGP (commodity) code and click the **Search** button. (You can also just leave the search field blank and hit the **Search** button. This will bring back ALL items on the originating price agreement.)
   ii. Click the underlined item number that you want to add to your Work Order.



   iii. This will bring the item over to the right side of the window. Enter a **Quantity.**

iv. Either click the **Submit/Next** button to add another item, or click **Next** to save and continue to the next page of the Document Wizard.

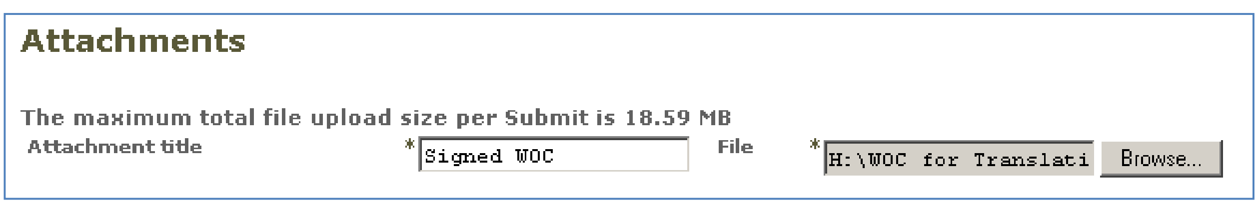


n. **Supplier Identification** – The Federal Tax ID number (FIN) or Social Security Number (SSN) listed for the supplier on the originating price agreement should auto-populate. Click **Next** to save and continue.

o. **Attachments** – It is not a requirement for you to upload attachments. However, if you do want to add attachments to the Work Order, do the following:

i. Enter an Attachment Title in the first field.

ii. Click the Browse button to locate the document on your computer.



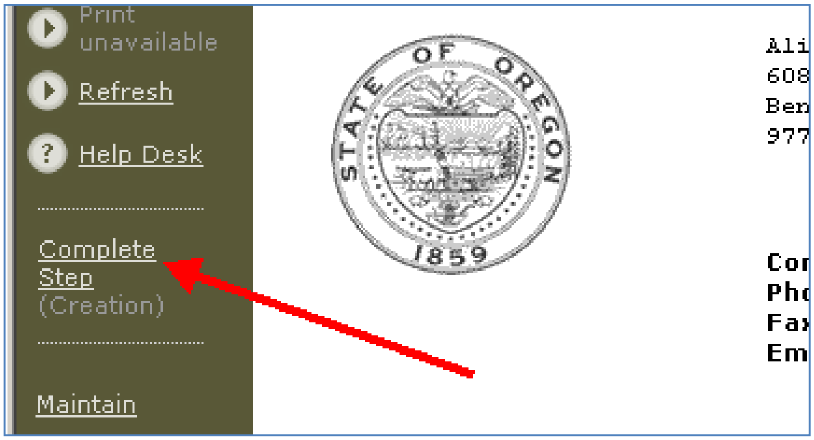
iii. Click **Next** to save and continue.

p. **Header Comments** – Enter a summary of the work to be performed. Click **Next** to save and continue.

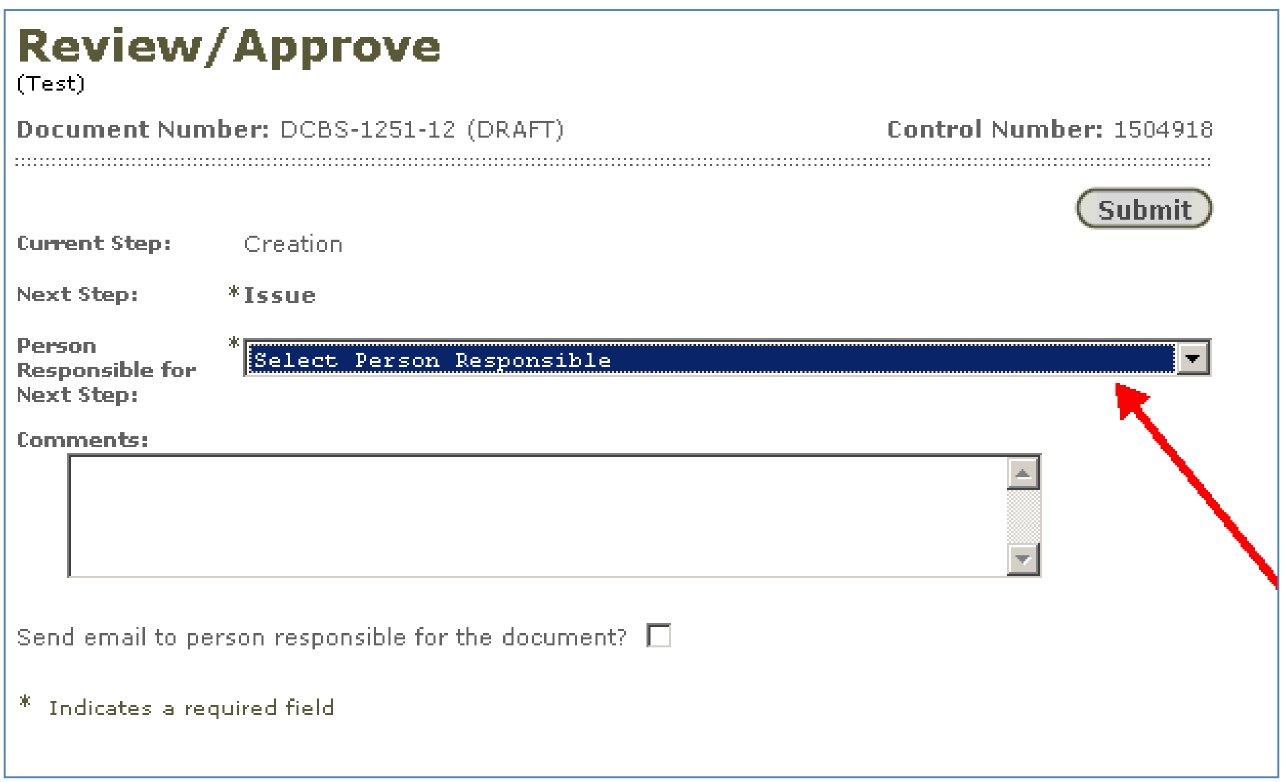
q. **Trailer Comments** – Enter any additional comments you want included in the trailer of the Work Order. Click **Next** to save and continue.

r. Click **Finish** to view the Work Order draft.

10. **<u>To complete the Work Order you must run it through the Workflow process.</u>** To do this, click on **Complete Step** in the left hand menu bar.

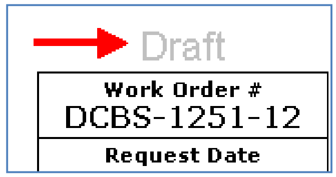


11. If you have missed any required fields, ORPIN will give you an error message and tell you what is missing. Otherwise, you will see a **Review/Approve** screen, asking you to select the person who will process the next step in the workflow.

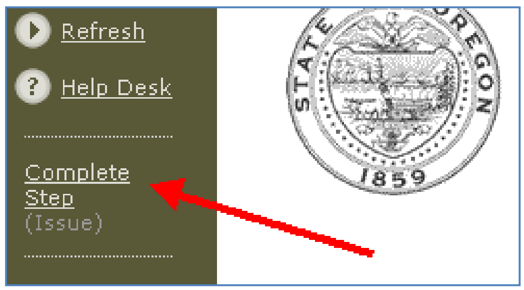


a. If you are going to process the next step, choose your own name from the dropdown.

b. If you want to assign this to someone else to process the Issue step, choose their name from the dropdown.
c. You will be placed back on the face of your Work Order document. Notice that the Work Order is still in Draft (as indicated in the upper right corner.)



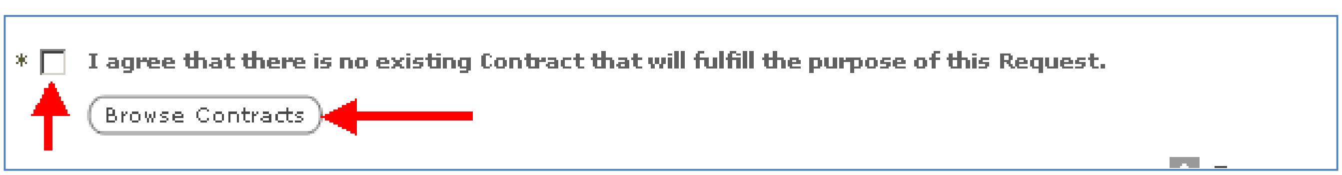
If you have assigned yourself as the person who will process the Issue step, click on **Complete Step** again in the left-hand menu bar.



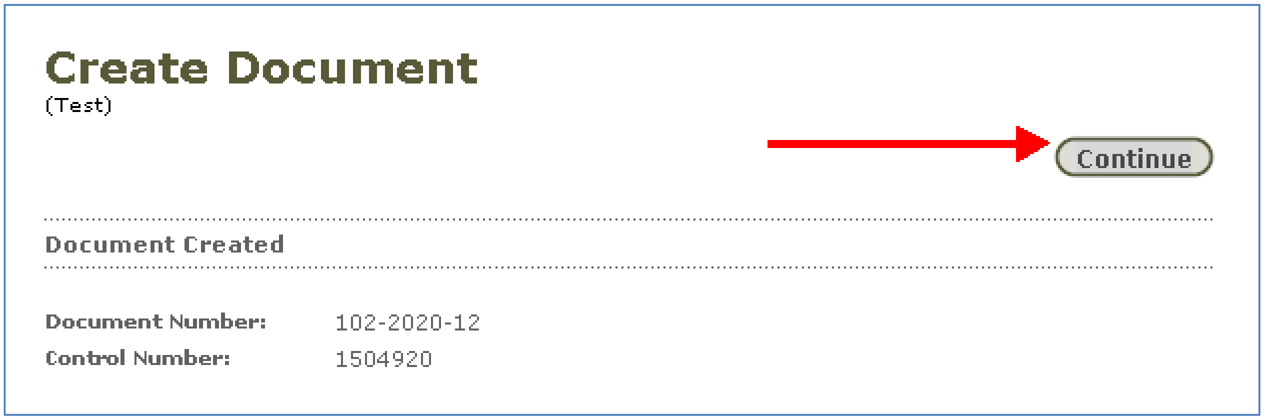
d. In the **Review/Approve** window, choose the agency that will remain responsible for the Master File in ORPIN from the dropdown.
e. Click the **Submit** button to issue the Work Order.

III. Creating a Purchase Request:

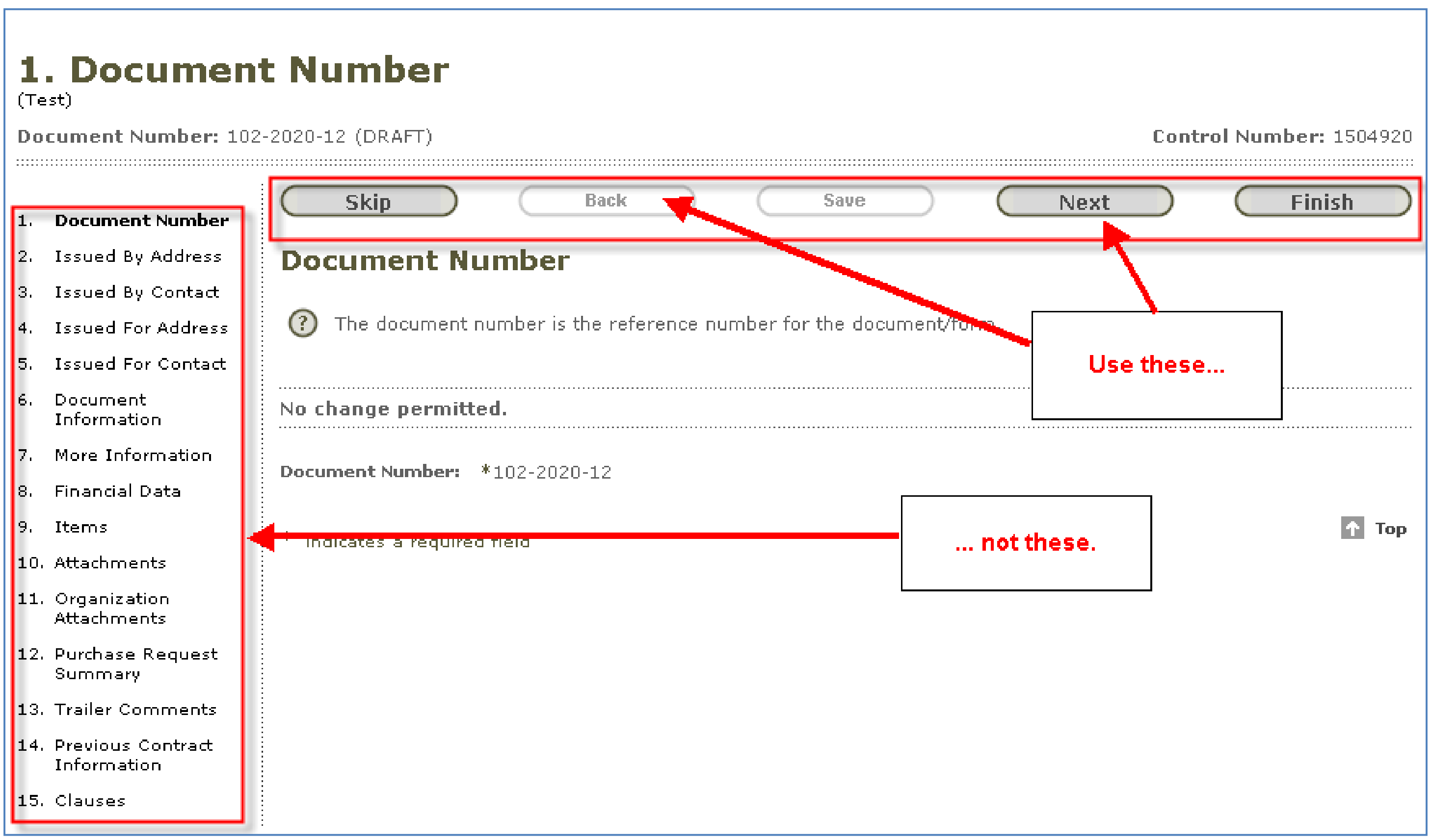
1. Click **Create Documents** in the left hand menu bar.
2. Choose the option titled **Create a Purchase Request**.
3. **Discipline** – Choose the radio button next to the most appropriate Discipline for the purchase. (See ORS 279A.010 for more information on definitions of Public Contracting Code.) Click **Next** to continue.
4. **Organizations** – Set the Issued By and Issued For agencies from the dropdowns. (You will only see those agencies you have authority to contract for in the dropdown lists.)
5. **Additional Information** – Before you can create the purchase request, you must confirm that there are no existing contracts that could fulfill the purpose of the request. To do this, perform a contract search using the **Browse Contracts** button. Once you complete your search, check "I agree…" to validate that there are no existing contracts.



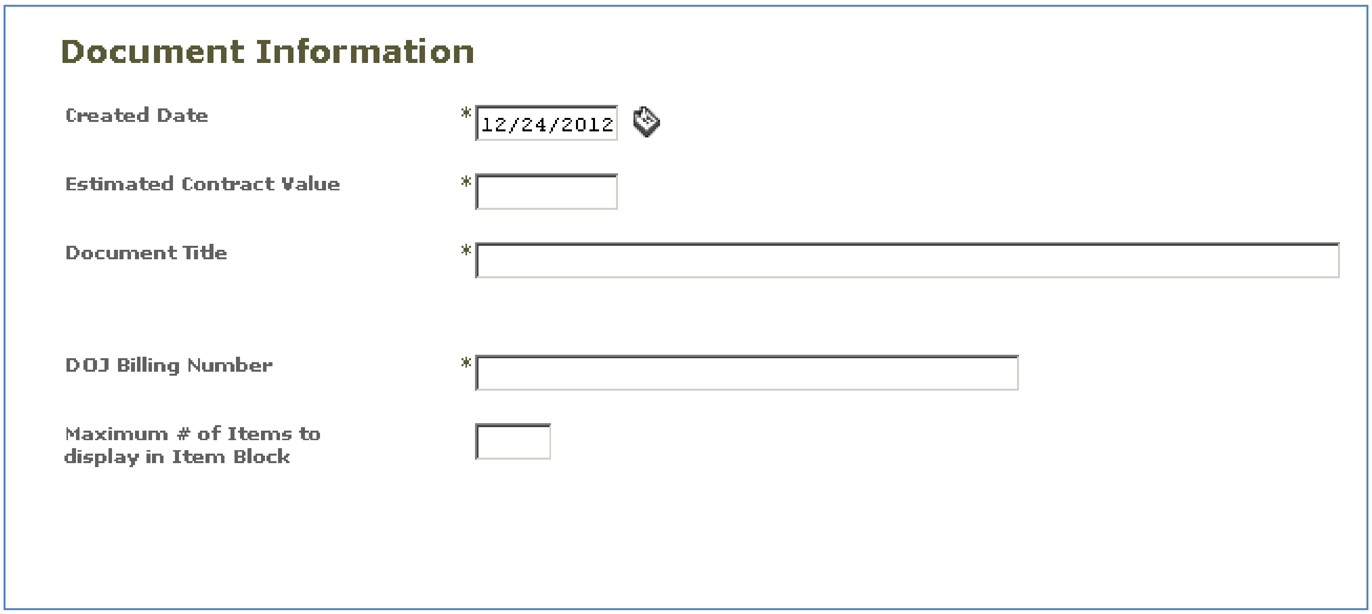
6. Click the **Create** button to continue.
7. The Purchase Request Number will display. Click the **Continue** button to transfer into the Document Wizard, which will help you fill out the necessary information on your purchase request.



Once you are in the Document Wizard, you will see all of the information screens listed down the left hand side of the window. Do not use these links to navigate from screen to screen, as doing so does not have an 'auto-save' feature so the information you type in will be lost. Instead, move from screen to screen by clicking either the **Back** or **Next** buttons.



8. Fill out all of the required information in the Document Wizard.
    a. **Document Number** – This will display the number automatically assigned when you created the Purchase Request. Click **Next** to save and continue.
    b. **Issued By Address** – The address should auto-populate based on the Issued By agency you selected when creating the Purchase Request. You can update it if needed. Click **Next** to save and continue.
    c. **Issued By Contact** – Either choose the contact name from the dropdown list or enter a new one in the fields below. Click **Next** to save and continue.
    d. **Issued For Address** – The address should auto-populate based on the Issued For agency you selected when creating the Purchase Request. You can update it if needed. Click **Next** to save and continue.
    e. **Issued For Contact** – Either choose the appropriate Agency Contact name from the dropdown list or enter one below. Click **Next** to save and continue.
    f. **Document Information** – The required fields are indicated with an asterisk.


Document Information

Created Date * 12/24/2012

Estimated Contract Value *

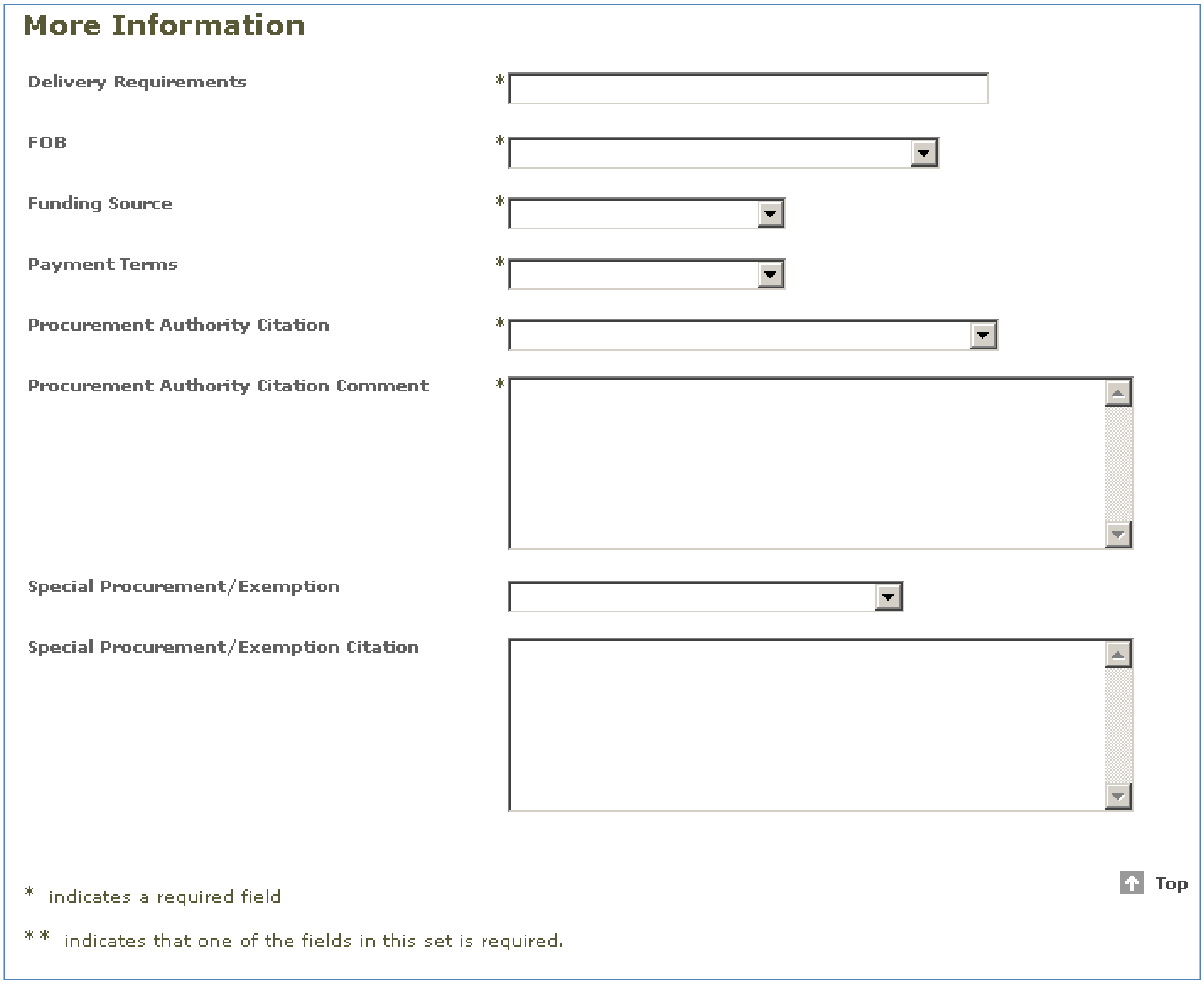
Document Title *

DOJ Billing Number *

Maximum # of Items to display in Item Block

i. **Created Date** – This field auto-populates based on the date you created the Purchase Request draft.
ii. **Estimated Contract Value** – Type in your estimate of what the contract value will be.
iii. **Document Title** – Type in a title for your purchase request. Use a phrase that will easily convey the purpose of the purchase request, (ie. Fire Extinguishers for General Services Building).
iv. **DOJ Billing Number** – Type in the billing number that the contracting office should give to DOJ. This will be the number used when DOJ bills for any services performed on this request.
v. Click **Next** to save and continue.

g. **More Information** – The required fields are indicated with an asterisk.



More Information

Delivery Requirements *

FOB *

Funding Source *

Payment Terms *

Procurement Authority Citation *

Procurement Authority Citation Comment *

Special Procurement/Exemption

Special Procurement/Exemption Citation

Top

* indicates a required field

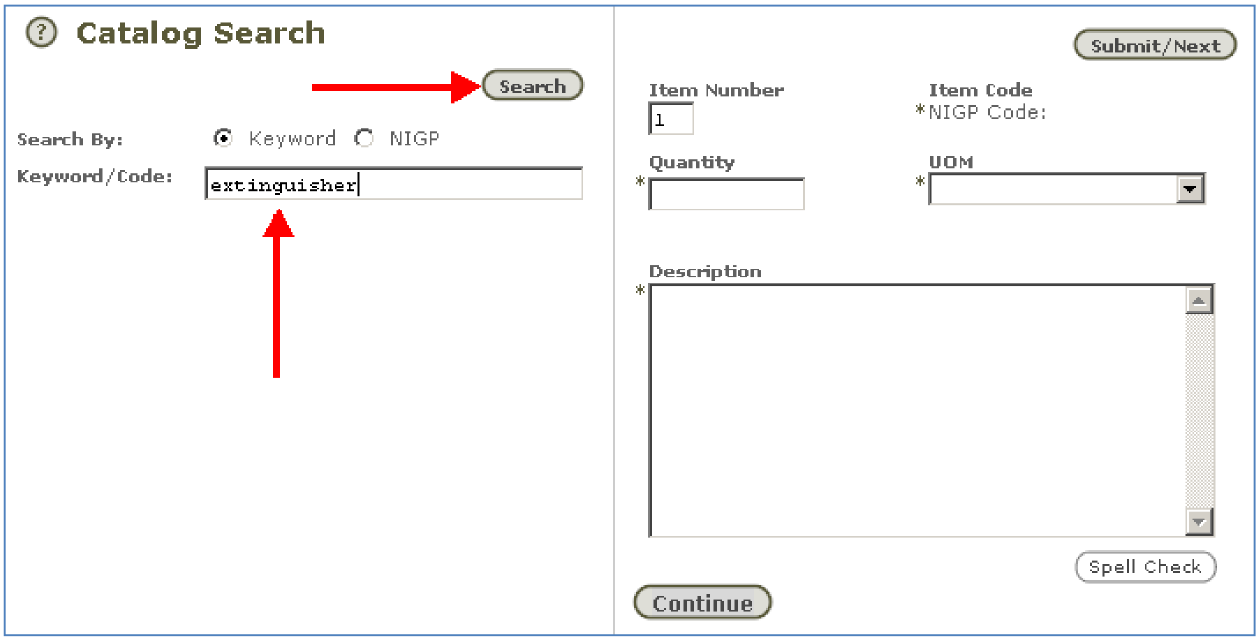
** indicates that one of the fields in this set is required.

i. **Delivery Requirements** – This is a required field. If you do not have delivery requirements to list, enter "N/A".
ii. **FOB** – Choose your preferred Freight on Board option from the dropdown.
iii. **Payment Terms** – Choose your preferred payment terms from the dropdown list.
iv. **Procurement Authority Citation** – Choose what type of authority you are procuring under.
v. **Procurement Authority Citation Comment** – Cite the specific rule/statute/etc. that gives you authority to perform this request.
vi. Click **Next** to save and continue.

h. **Financial Data** – If you would like to capture your accounting codes for this purchase request, you may do so here. However these are not required fields so you can skip this page if desired. Click **Next** to save and continue.

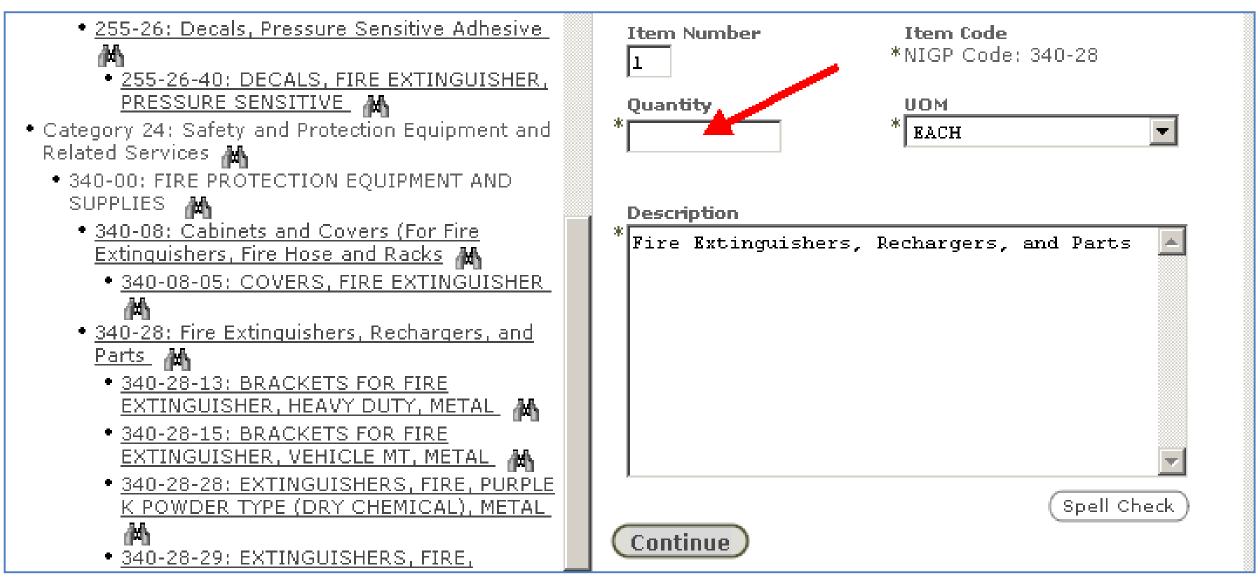
i. **Items** – You should have at least one item listed on the Purchase Request before submitting it.

    i. To search for an item, either enter a Keyword or NIGP (commodity) code and click the **Search** button. (This search may take a few moments.)

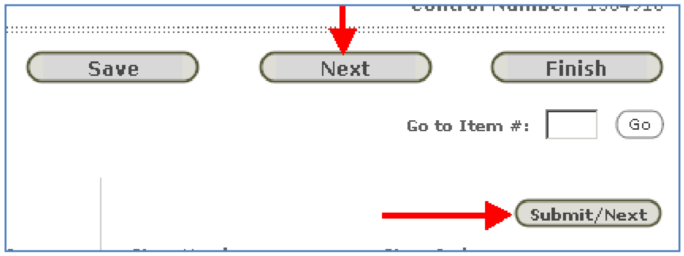


    ii. Click the underlined commodity that you want to add to your Purchase Request.

    iii. This will bring the item over to the right side of the window. Enter a **Quantity.**



iv. Either click the **Submit/**Next button to add another item, or click **Next** to save and continue to the next page of the Document Wizard.



j. **Attachments** – It is not a system requirement for you to upload attachments. To add attachments to the Purchase Request, do the following:
   i. Enter an Attachment Title in the first field.
   ii. Click the Browse button to locate the document on your computer.
   iii. Click **Next** to save and continue.

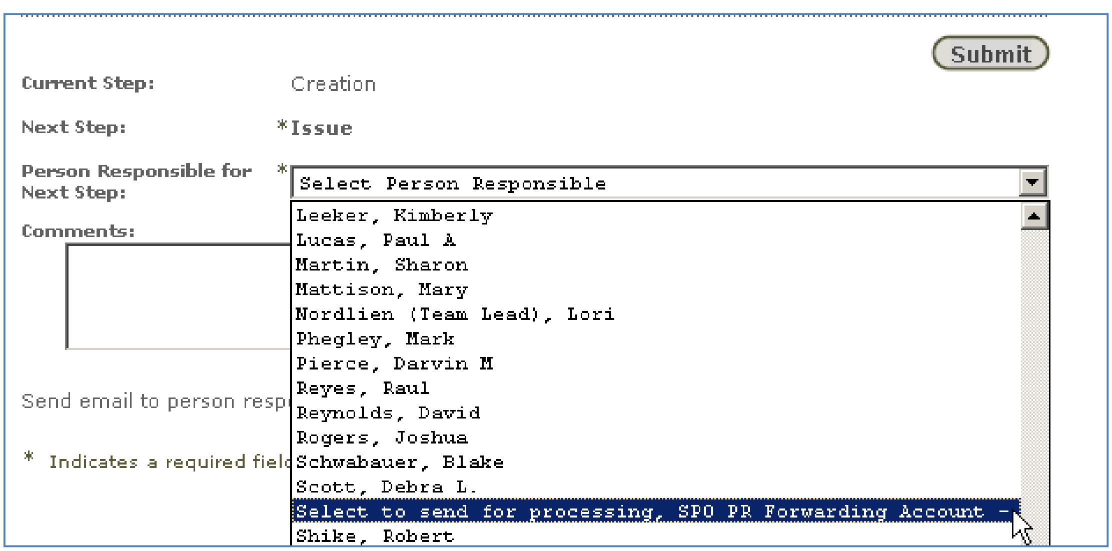
k. **Purchase Request Summary** – Enter a summary of the purchase needs. Click **Next** to save and continue.

l. **Trailer Comments** – Enter any additional comments you want included in the trailer of the Purchase Request. Click **Next** to save and continue.

m. **Previous Contract Information** – If there are previous contracts, list the details.

n. Click **Finish** to view the Purchase Request draft.

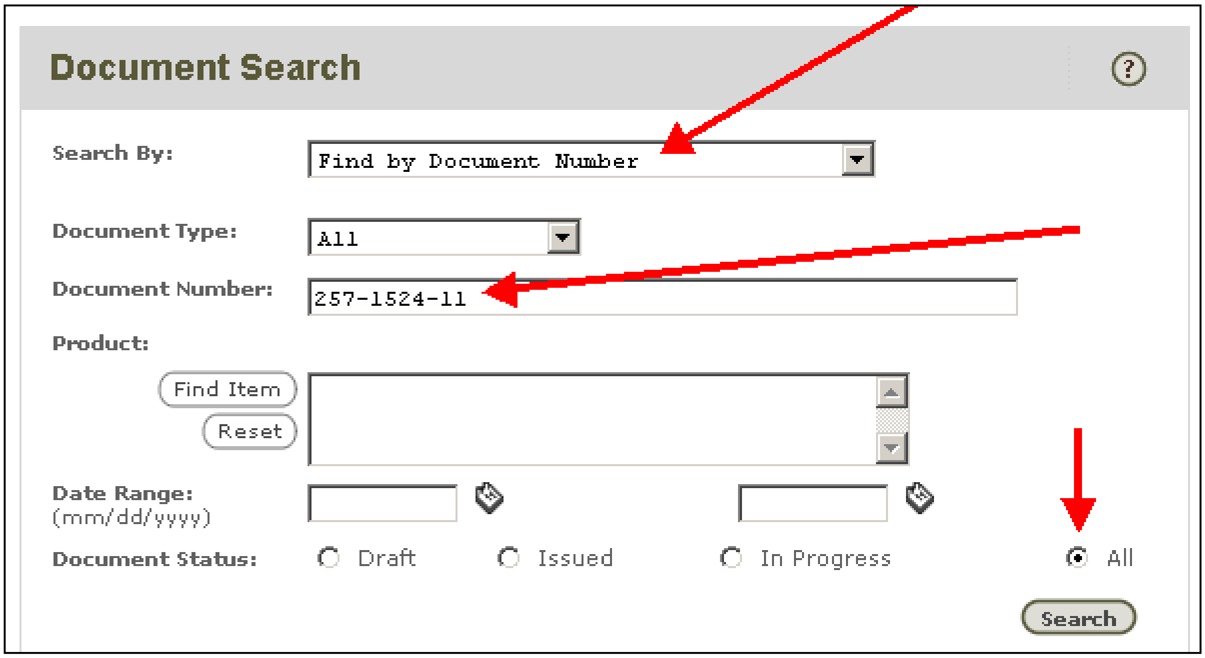
9. Your Purchase Request has not yet been assigned to the contracting office. To do so, click on **Complete Step** in the left-hand menu bar.
   a. <u>DO NOT CHOOSE YOUR OWN NAME TO ISSUE THE PURCHASE REQUEST!</u> You should assign the Issue step to the contracting office that will be performing the solicitation on your behalf. Choose either your agency's contracting office from the dropdown, or choose the option "Select to send for processing, SPO PR Forwarding Account" to send it to the DAS Procurement Services Office.



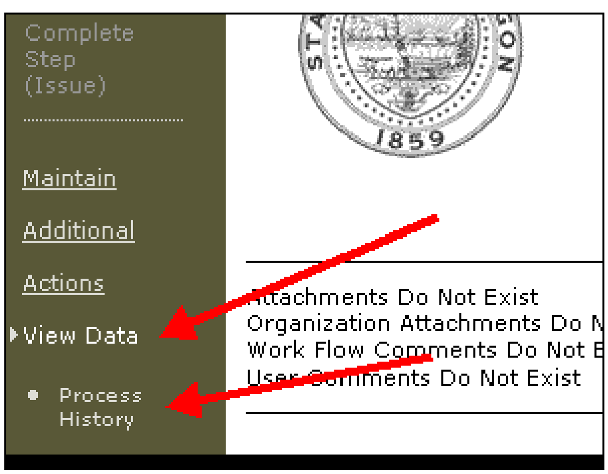
b. Once you have selected the appropriate party for the Issue step, click the **Submit** button to assign it.

<u>How to Check the Status of your Purchase Request (PR)</u>

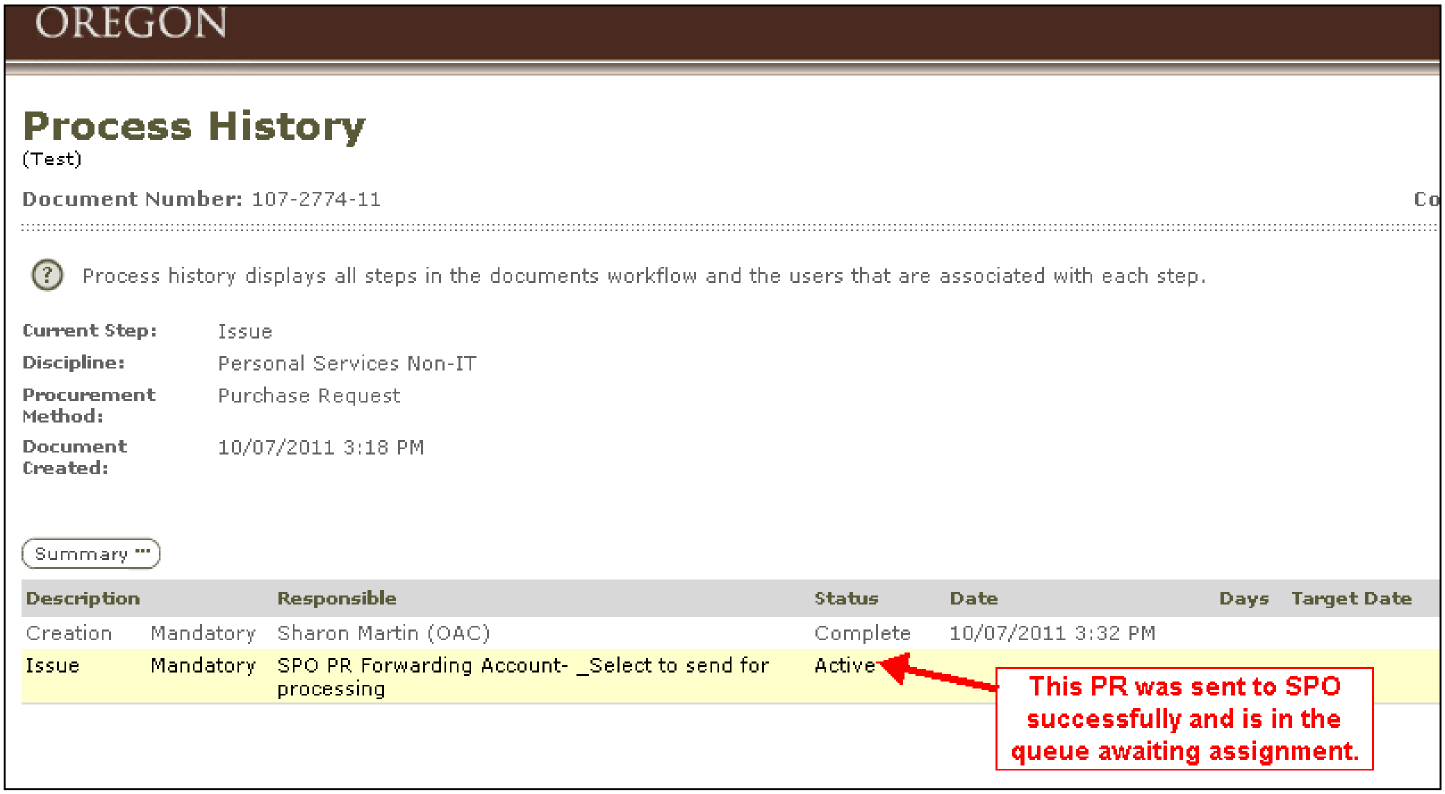
1. Click on **My Documents** in the left-hand menu bar.
   a. Set the **Search By** dropdown to “Find by Document Number”.
   b. Type the PR number in the **Document Number** field.
   c. Set the **Document Status** button to “All”.
   d. Click the Search button.



2. Open the document and click on **View Data** in the document menu bar, then click on **Process History**.



3. Check to see who currently has control of the document.
    a. If the document is still in draft and the Responsible Party for the current step is listed as “SPO PR Forwarding Account” then it is sitting in the queue at Procurement Services office, waiting to be assigned.



OREGON

Process History

(Test)

Document Number: 107-2774-11

Process history displays all steps in the documents workflow and the users that are associated with each step.

Current Step:	Issue
Discipline:	Personal Services Non-IT
Procurement Method:	Purchase Request
Document Created:	10/07/2011 3:18 PM

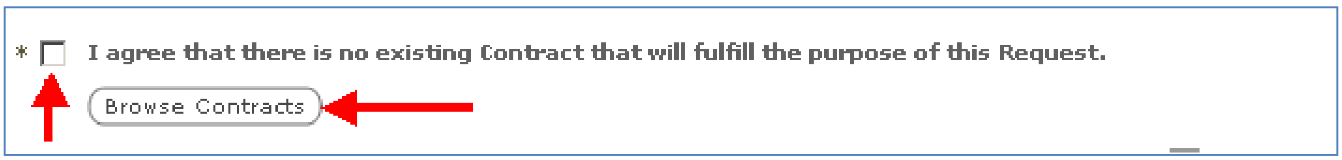
Summary

Description		Responsible	Status	Date	Days	Target Date
Creation	Mandatory	Sharon Martin (OAC)	Complete	10/07/2011 3:32 PM		
Issue	Mandatory	SPO PR Forwarding Account- _Select to send for processing	Active			

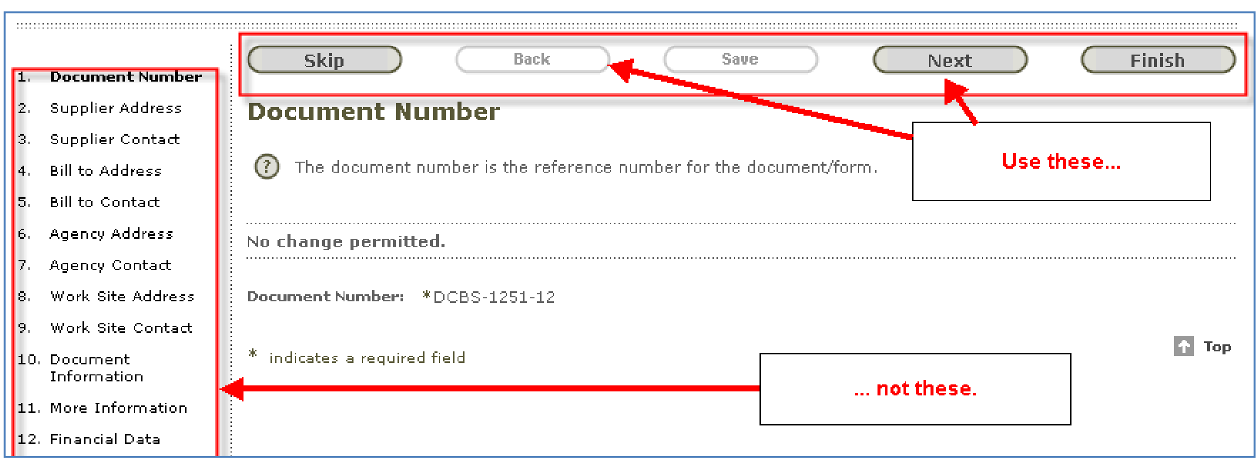
    b. If the document is still in draft and the Responsible Party for the current step is listed as a user at the Procurement Services office, it is has been assigned to that individual for processing.
    c. If the document is still in draft and the Responsible Party for the current step lists someone in your agency, it could mean one of three things. Either it was never sent over to Procurement Services to begin with, SPO has reverted the PR back to your agency for some reason (you would see a Revert step in the process history if this has occurred), or you sent the PR to your own agency’s contracting office, (in which case someone in your agency would be displayed as the Responsible Party).
    d. If the document is not in draft, check the Process History to see who completed the Issue step on the document. If the PR was issued by a user within your agency (and the SPO PR Forwarding Account never shows up in the steps listed in Process History) it was never sent to the Procurement Services office and they have no knowledge of it. If the PR was issued by a SPO employee, it is complete and moving into the next phase of the process.

IV. Creating a Solicitation:

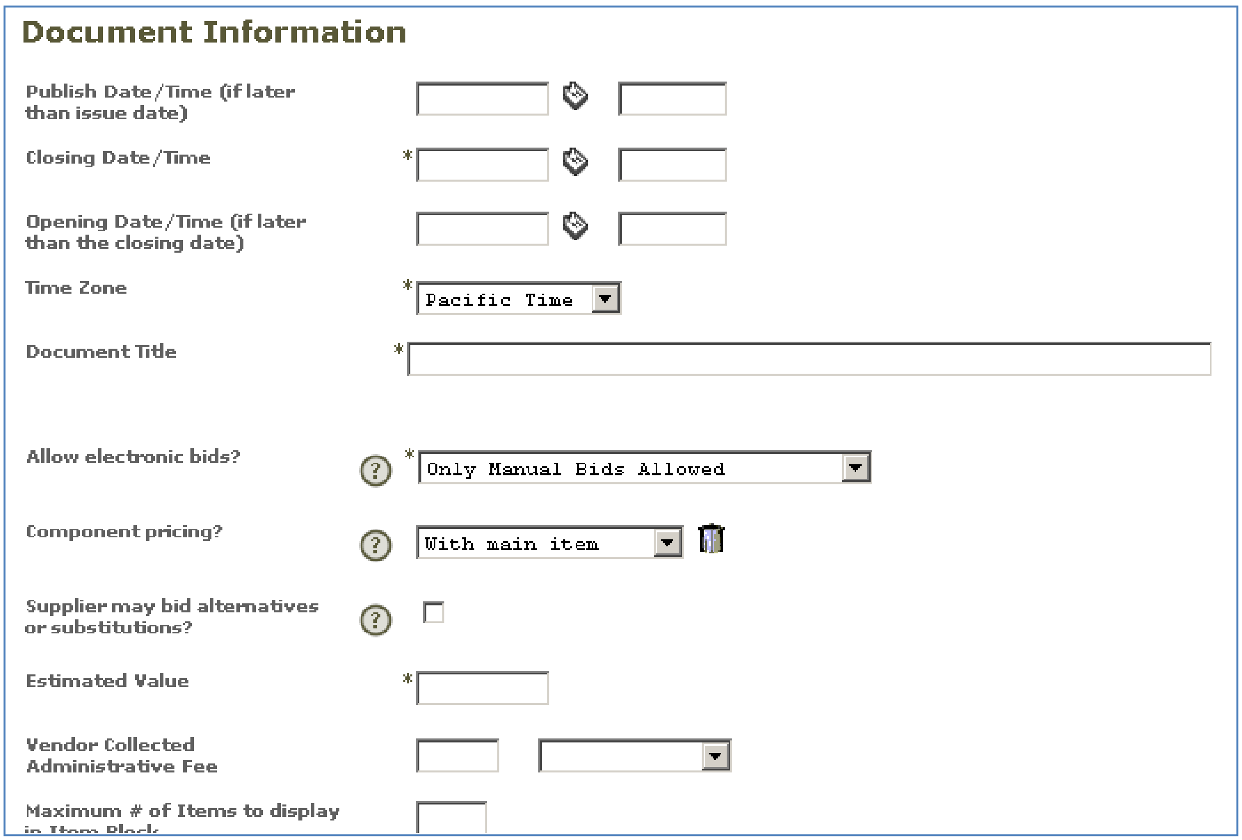
1. Click **Create Documents** in the left hand menu bar.
2. Choose the option titled **Create an Opportunity.**
3. **Discipline** – Choose the radio button next to the most appropriate Discipline for the purchase. (See ORS 279A.010 for more information on definitions of Public Contracting Code.) Click **Next** to continue.
4. **Procurement Method** – Select the method you will use for your procurement. Click **Next** to continue.
5. **Organizations** – Set the Issued By and Issued For agencies from the dropdowns. (You will only see those agencies you have authority to contract for in the dropdown lists.)
6. **Additional Information** – Before you can create the opportunity, you must indicate the Type of opportunity (choose from the Type dropdown) and confirm that there are no existing contracts that could fulfill the purpose of the request. To do this, perform a contract search by clicking the **Browse Contracts** button. Once you have completed your search, check the "I agree…" box to validate that there are no existing contracts.



7. Click the **Create** button to continue.
8. The Opportunity Number will display. Click the **Continue** button to transfer into the Document Wizard, which will help you fill out the necessary information on your opportunity. Once you are in the Document Wizard, you will see all of the information screens listed down the left hand side of the window. Do not use these links to navigate from screen to screen, as doing so does not have an 'auto-save' feature so the information you type in will be lost. Instead, move from screen to screen by clicking either the **Back** or **Next** buttons along the top of the window.



9. Fill out all of the required information in the Document Wizard.
    a. **Document Number** – This will display the number automatically assigned when you created the Opportunity. Click **Next** to save and continue.
    b. **Issued By Address** – The address should auto-populate based on the Issued By agency you selected when creating the Opportunity. You can update it if needed. Click **Next** to save and continue.
    c. **Issued By Contact** – Either choose the contact name from the dropdown list or enter a new one in the fields below. Click **Next** to save and continue.
    d. **Issued For Address** – The address should auto-populate based on the Issued For agency you selected when creating the Opportunity. You can update it if needed. Click **Next** to save and continue.
    e. **Document Information** – The required fields are indicated with an asterisk.



        i. **Publish Date/Time** – This is an <u>optional</u> field. This field allows you to postpone publishing your opportunity for the public to see. ONLY FILL THIS IN IF YOU NEED TO DELAY PUBLISHING YOUR DOCUMENT. If you leave the Publish Date/Time field blank, ORPIN will automatically publish the document for the public when you process it through the issuing workflow.
        ii. **Closing Date/Time** – Type in the day and time that your opportunity should close. Click the icon next to the date field to choose the day from a calendar if desired.

iii. **Opening Date/Time** – This is an optional field. Use this field to indicate when you plan on opening the bids.

iv. **Time Zone** – This defaults to Pacific Time. Choose another option from the dropdown if needed, otherwise leave it set to the default.

v. **Document Title** – Enter a title for your opportunity describing what good or service you are soliciting for. This is the text that the public will see when viewing a list of available opportunities to bid on, so be as specific as possible. For example, use “Frozen Peas” instead of “Food Solicitation” or “Opportunity 513”.

vi. **Allow electronic bids?** – This field defaults to “Only Manual Bids Allowed” which means that you will not be accepting electronic bids (or eBids) submitted through the ORPIN program. You may choose to change this to “Manual or Electronic Bids Allowed” but there is not an option to ONLY allow for electronic bids. Therefore you must always offer suppliers the ability to submit a manual (hard copy) bid.

vii. **Component Pricing** – If you want to offer suppliers the ability to break out item pricing into sub-items, indicate this here.

viii. **Supplier may bid alternatives or substitutions?** – If you want to allow suppliers to offer alternatives to your listed items, check this box.

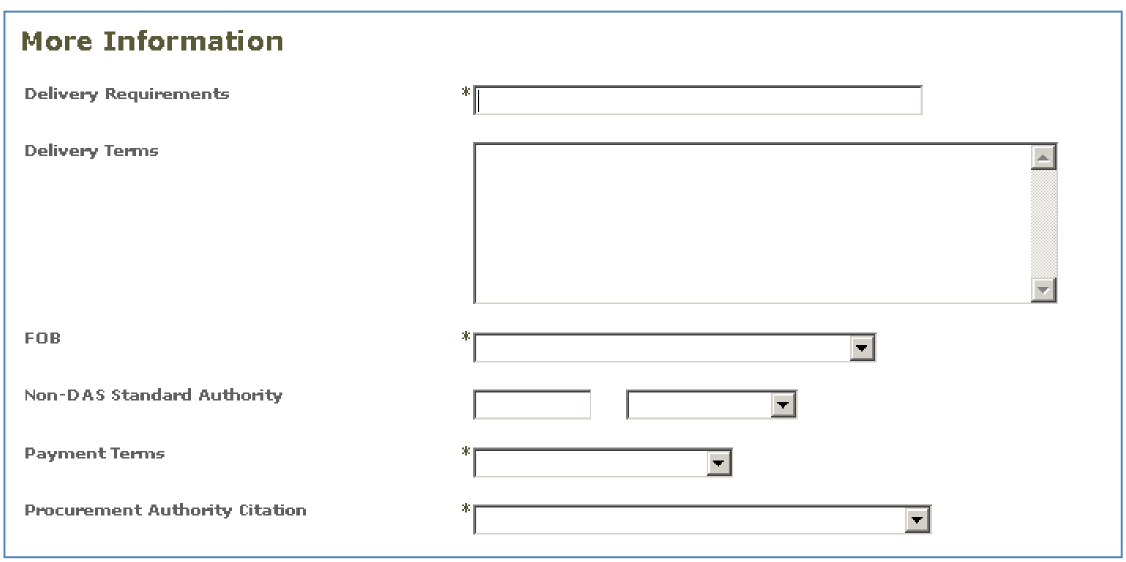
ix. **Estimated Value** – Please indicate what you estimate the value of the resulting contract will be. This information will not be visible to the supplier- it is for internal reporting purposes only.

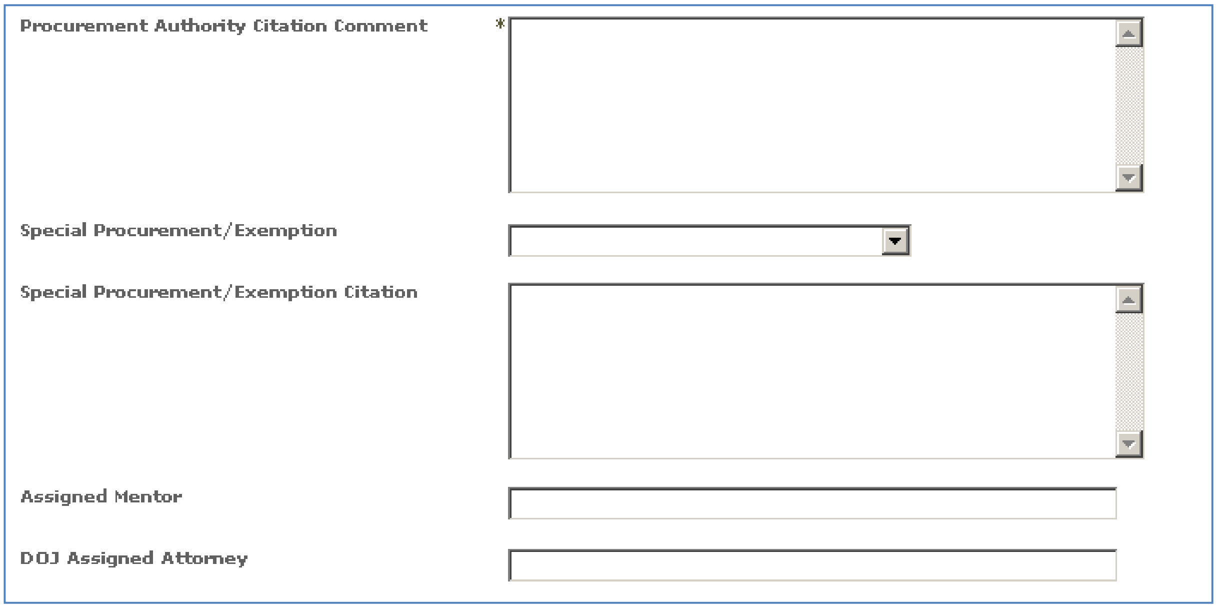
x. **Vendor Collected Administrative Fee** – If there will be VCAF collected on the resulting contract, indicate this here.

xi. **Maximum # of Items to display in Item Block** – Leave this field blank.

xii. Click **Next** to save and continue.

f. **More Information** – The required fields are indicated with an asterisk.



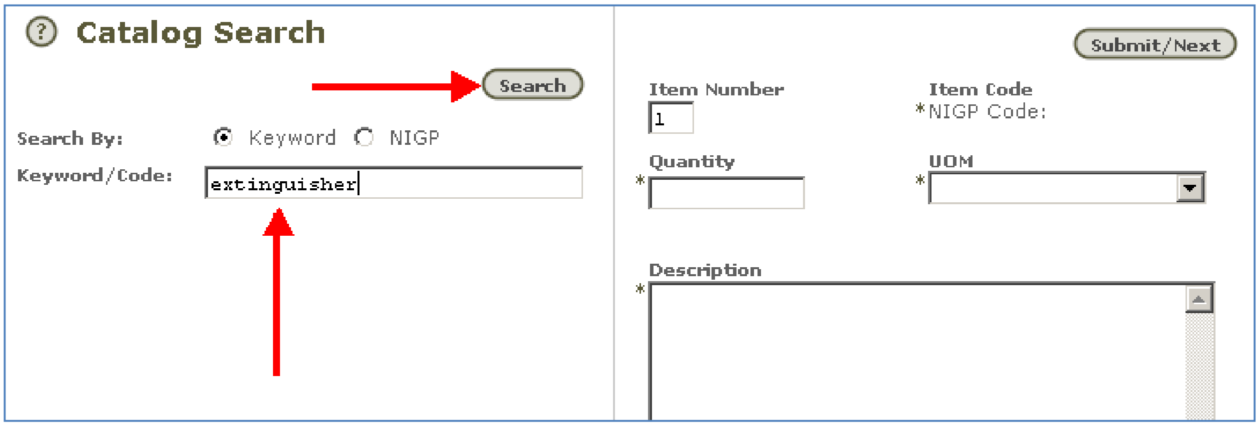


i. **Delivery Requirements** – This is a required field. If you do not have delivery requirements to list, enter "N/A".
ii. **Delivery Terms** – List any specific delivery terms here.
iii. **FOB** – Choose your preferred Freight on Board option from the dropdown.
iv. **Non-DAS Standard Authority** – Use this field to cite your purchasing authority if it deviates from the standard DAS purchasing authority.
v. **Payment Terms** – Choose your preferred payment terms from the dropdown list.
vi. **Procurement Authority Citation** – Choose what type of authority you are procuring under.
vii. **Procurement Authority Citation Comment** – Cite the specific rule/statute/etc. that gives you authority to perform this request.
viii. **Special Procurement/Exemption** – If you are conducting this opportunity via an approved Special Procurement or an Exemption, indicate it in the dropdown.
ix. **Special Procurement/Exemption Citation** – If you selected Special Procurement or Exemption in the above dropdown, please cite the number here.
x. **Assigned Mentor** – This is an optional field for agencies to use if they would like to capture the name of a mentor guiding the procurement professional through this solicitation.
xi. **DOJ Assigned Attorney** – This is an optional field for agencies to use if they would like to capture the name of the attorney at DOJ who reviewed this solicitation.
xii. Click **Next** to save and continue.

g. **Financial Data** – If you would like to capture your accounting codes for this purchase request, you may do so here. However these are not required fields so you can skip this page if desired. Click **Next** to save and continue.

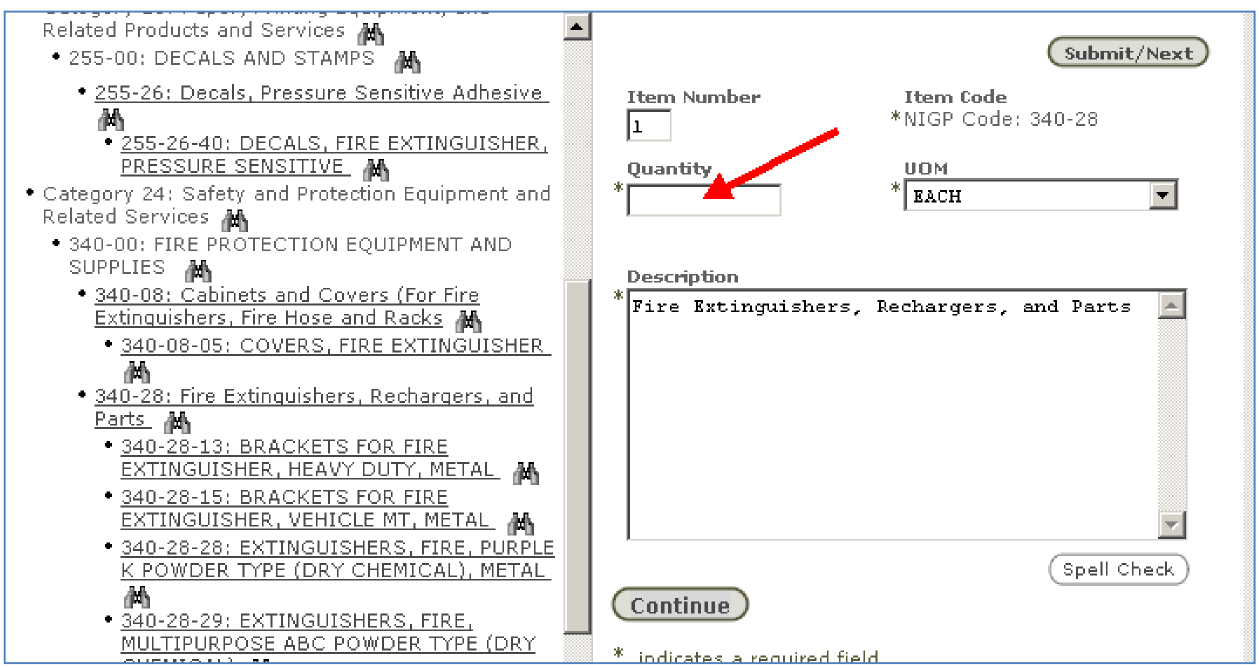
h. **Items** – You should have at least one item listed on your opportunity. ORPIN will use the items you choose to decide who to send out push notice emails to. It will also categorize opportunities by items for suppliers as they browse the open opportunities list.

   i. To search for an item, either enter a Keyword or NIGP (commodity) code and click the **Search** button. (This search may take a few moments.)

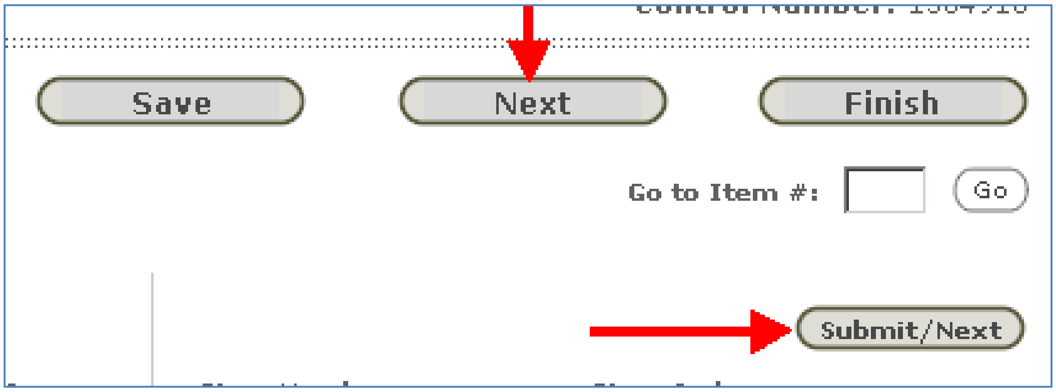


   ii. Click the underlined commodity that you want to add to your opportunity.

   iii. This will bring the item over to the right side of the window. Enter a **Quantity.**



iv. Either click the **Submit/**Next button to add another item, or click **Next** to save and continue to the next page of the Document Wizard.



i. **Attachments** – It is not a system requirement for you to upload attachments, but it is best practice to do so. You can include specific instructions, drawings, maps, specs, etc pertaining to your solicitation. To add attachments to the Opportunity, do the following:
    i. Enter an Attachment Title in the first field.
    ii. Click the Browse button to locate the document on your computer.
    iii. Click **Next** to save and continue.
j. **Opportunity Comments** – This field is an optional area to capture any additional comments you want to note. <u>It will be visible to suppliers.</u>
k. **Opportunity Summary** – Enter a summary of the solicitation needs to explain to the supplier what you need. Click **Next** to save and continue.
l. **Trailer Comments** – Enter any additional comments you want included in the trailer of the Opportunity. This will also be visible to the suppliers. Click **Next** to save and continue.
m. **Commodity Match** – You may choose to list additional commodities that aren't exactly what the items are in your solicitation but are close. This will cause ORPIN to send push email notifications to additional suppliers that have these commodities listed in their profiles.
n. **Geographic Bid Matching** – During the registration process, ORPIN asks suppliers to indicate what regions in Oregon they can provide goods or services to. When you are creating your solicitation, you are required to pick a region so that ORPIN can match this up with supplier's profiles to decide who to send email push notices to.
o. Click **Finish** to view the Opportunity draft.

10. If you would like to prompt ORPIN to send an email about your solicitation to a list of suppliers, you can use either the **Invite or Notify** option.
    a. Click on **Additional** in the menu bar.

b. Select **Invited/Notified/Interested Suppliers**.

c. The radio button will default to **Notify**.

i. **Notify** prompts ORPIN to send an email to the list of suppliers you will specify, but also publishes the Opportunity for all suppliers to view/bid on.

ii. **Invite** prompts ORPIN to send an email to the list of suppliers you will specify, but does not publish the Opportunity for suppliers to see. This means that only those suppliers you add to the Invite list will know that this solicitation exists.

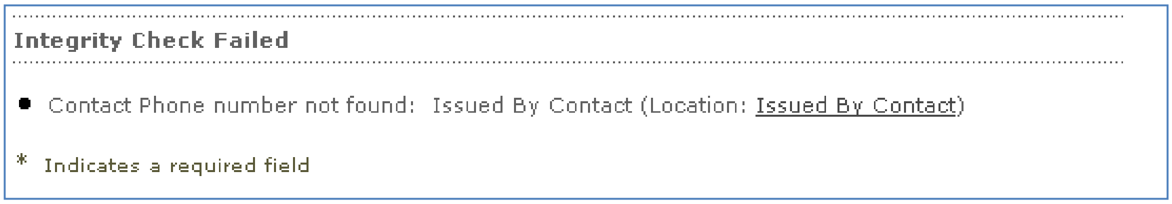
Please note- if you do use the Invite or Notify option on a solicitation, you will not be able to change your choice after you issue the document. This means that if you do an Invite, you cannot later change it to Notify so that the public can see the solicitation. You would have to withdraw your solicitation and start over leaving it visible to the public. Subsequently, if you do a Notification, you cannot later change it to an Invite.

d. Click on the **Find Supplier to Notify** or **Find Supplier to Invite** button (depending on whether you are doing a notification or an invite).

e. Type the supplier's company name in the **Supplier** field.

f. Check the box next to the correct Supplier.
g. Click the **Submit** button at the top of the list. This will add the supplier to your Notify/Invite list.
h. Repeat steps d-g until your list is complete.
i. Click the **Finish** button.

11. In order for you to publish your opportunity, you must process it through the workflow.
    a. Begin by clicking **Complete Step (Create)** in the menu bar.
        i. If your opportunity is missing any required information, you will receive an “Integrity Check Failed” message outlining what is missing.



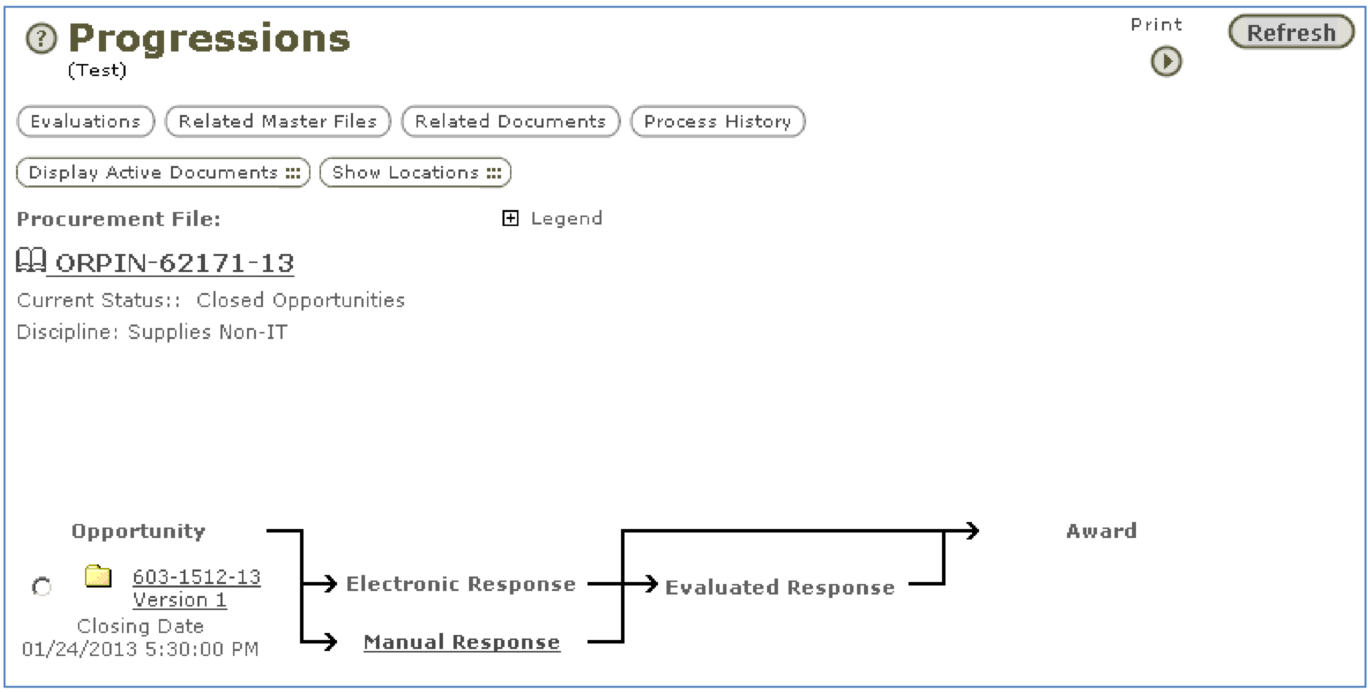
        ii. Click on the underlined location and fill in the missing information.
        iii. Once all of the information is populated, you can click on **Complete Step (Creation)** again.
    b. The next step in the workflow will display. Click the dropdown box and choose the name of the person who will process the next step. If you plan on completing the workflow yourself, choose your own name in the dropdown. *Note: Some steps in ORPIN are conditional based on the type of procurement and the dollar value so the workflow steps you see may vary based on the solicitation.*
    c. Continue clicking on the **Complete Step** button until you have issued the document or assigned it to someone else to complete.
12. In order to make a change to a solicitation that has been issued, you need to either create an Addenda or a Revision.
    a. Open your solicitation.
    b. Click on **Actions** in the menu bar.
    c. Choose either **Create Addendum** or **Create Revision**.
    d. Confirm the closing date/time of the document.
    e. Click **Continue** to be taken into the Document Wizard to make your changes.
    f. Leave the words “Addendum #_” or “Revision #_” but type the reason for your addendum or revision into the box.

g. Change any other information that needs to be updated.
h. Click the **Finish** button.
i. Process the document through the workflow by clicking on **Complete Step** until you have issued the addendum/revision.

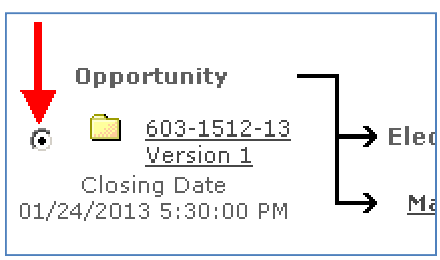
V. Bidding:

To enter a hard copy bid (Manual Bid) on a solicitation:

1. Open the document and click on **View Data** in the menu bar.
2. Click on **Progression**.
3. You will see a progression screen that displays the activities occurred within the master file.



4. To enter a manual bid, click the radio button next to the opportunity.

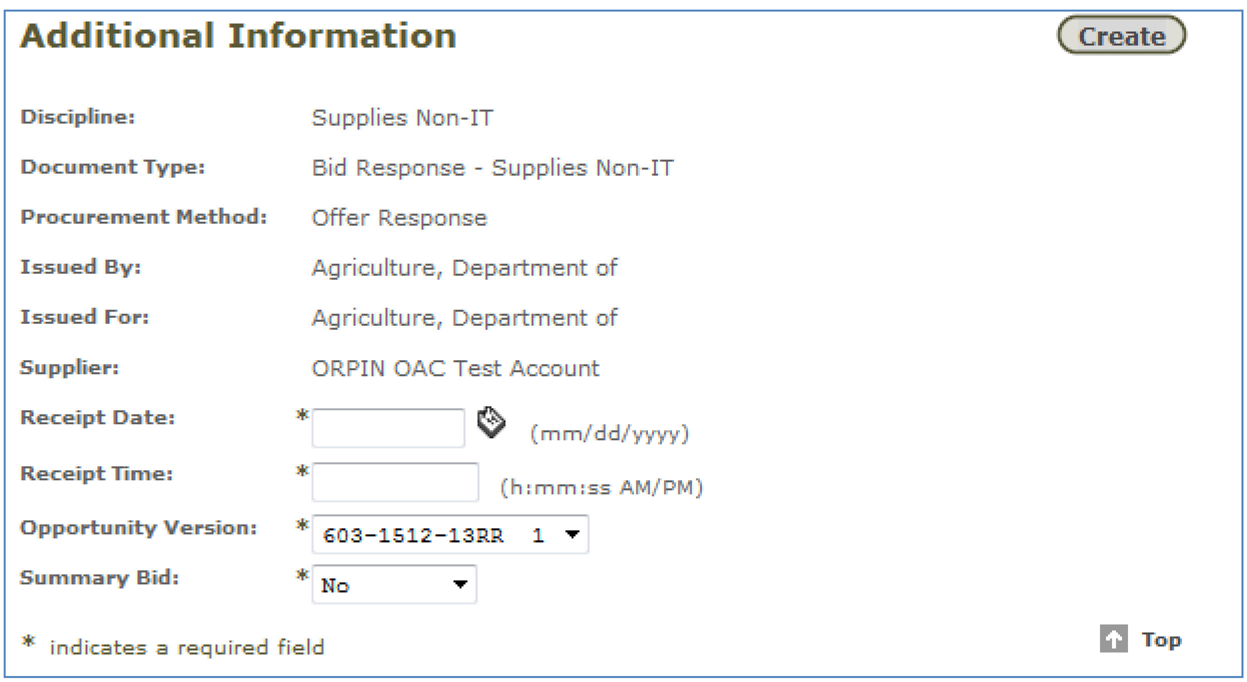


5. Click on the underlined words **Manual Response**.
6. Click the **Find** button to locate the supplier who submitted the bid.

7. Type the supplier's company name in the **Supplier Name** field and click the **Search** button.
8. Click on the correct supplier from the results listed. If the supplier does not show in the list, try searching again using only part of the name. If there are commas, dashes, etc in the supplier's name, try omitting them and running the search. Once you are absolutely positive that the supplier is not in the system already, you can click the **Add Supplier** button about the search box to build a shell account in the system for the supplier so that you may tie the bid to their company name.

Note: The "Add Supplier" button is not visible before you search for the supplier. Once you perform a search, it will show up and be available for use.

9. After you've selected your supplier, click the **Next** button to begin the bid document.
10. Fill in the required information.



a. **Receipt Date** – Enter the date the bid was received. You can click the icon to the right of the text field to choose the date from a calendar.

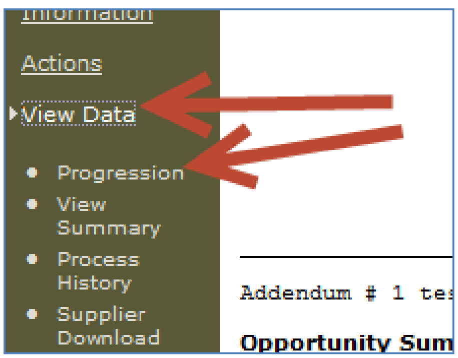
b. **Receipt Time** – Enter the time (including seconds) the bid was received.
c. **Opportunity Version** - If there are multiple versions of the opportunity due to addenda/revisions, choose the version that the supplier bid against from the choices listed in the dropdown.
d. **Summary Bid** – If you plan on entering just a summary total (instead of line item pricing) set the Summary Bid option to “Complete”. If there is a summary total of items either for the entire bid or for a portion of the bid, select the appropriate option from the dropdown.

11. Click **Create** to create the bid document.

NOTE: *If you are creating this bid PRIOR to the solicitation closing, you will be taken to a screen that informs you that the document has been created but cannot be viewed at this time. This is because you are not allowed to post pricing or other details until after the solicitation has closed. Once the opportunity closes, you can pull up the bid and by completing steps 12-15 so that you may finish entering the data.*

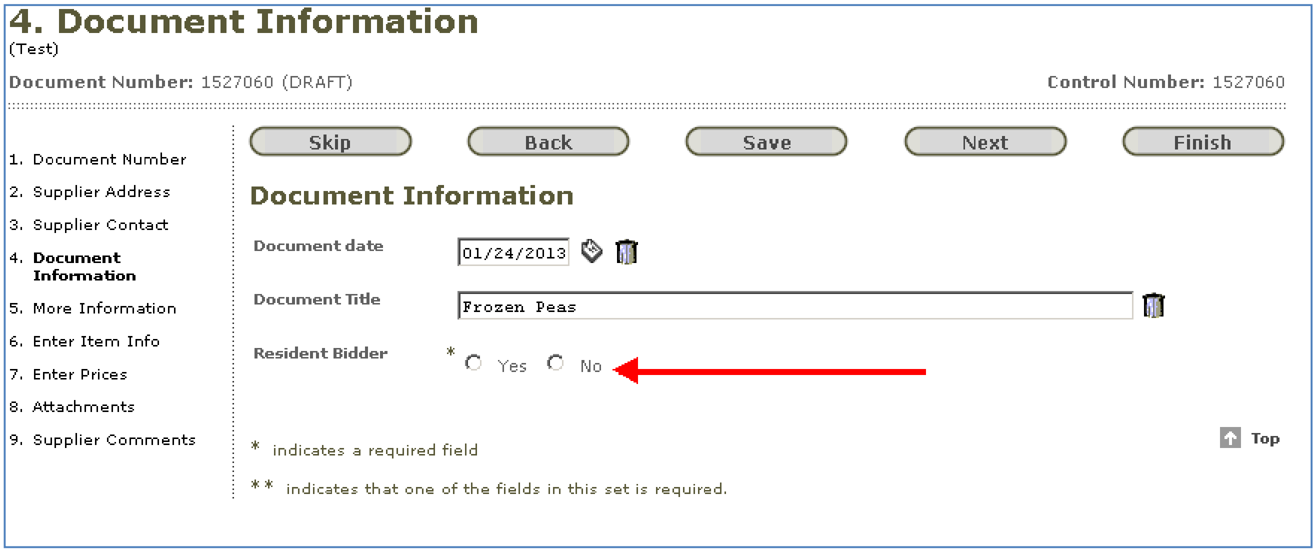
If you are creating the Manual Bid AFTER the solicitation closing, skip down to Step 16 now.

12. To complete the data entry on a Manual bid, open the solicitation document and click on **View Data** in the menu bar.
13. Click on **Progression**.



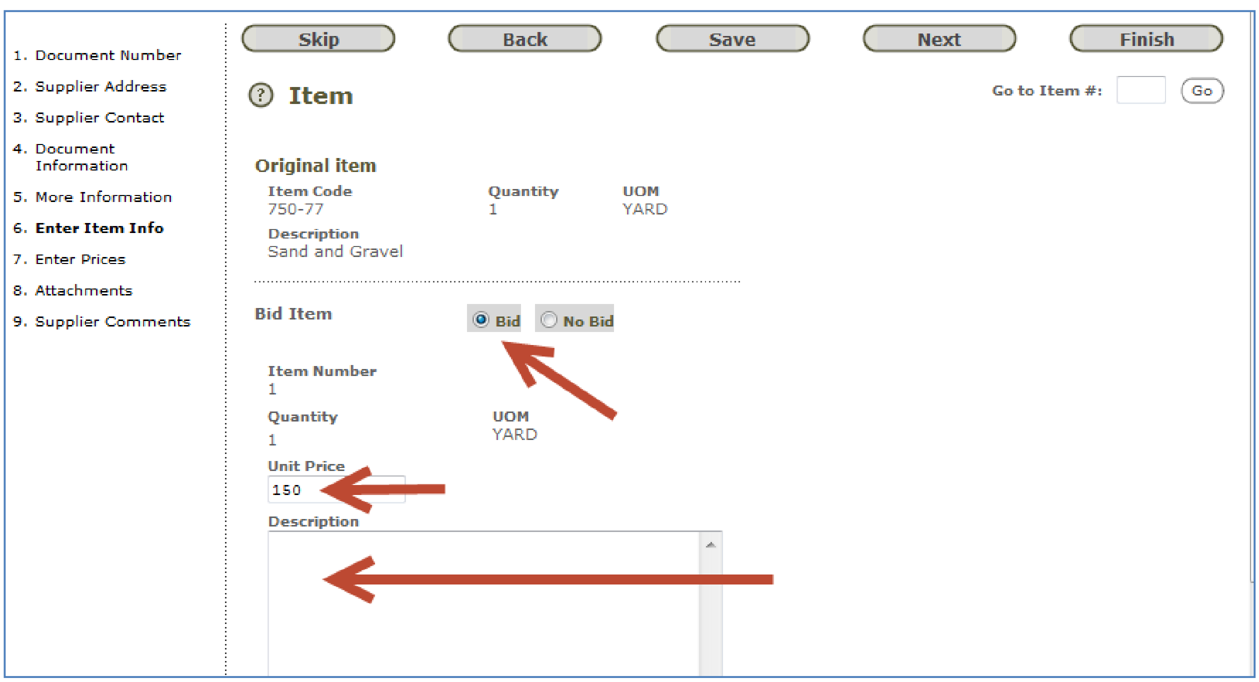
14. You will see a progression screen that displays the activities on this solicitation.
15. Click on the manual bid that you wish to complete. (It will have an X next to it to indicate that it is not yet issued.)
16. Click the **Maintain** button in the left hand menu bar.
    a. **Document Number** - The system automatically assigns a number to the bid. Click **Next** to save and continue.
    b. **Supplier Address** – The supplier’s address will automatically populate from their registration information. Click **Next** to save and continue.
    c. **Supplier Contact** – The supplier’s contact information will automatically populate from their registration information. Leave it set to the displayed contact or choose another from the dropdown. Click **Next** to save and continue.

d. **Document Information** – The document date and time will automatically populate. However, you must indicate whether or not the supplier is a **Resident Bidder**. Click **Next** to save and continue.



e. **More Information** - Fill in the Payment Comments or Delivery Comments if desired. Click **Next** to save and continue.

f. **Enter Item Info** – The first item on your solicitation will display. The system defaults to "No Bid" on the item, so you will need to change this in order to enter a price on it. Change the radio button over to "Bid" and then enter in the "Unit Price". You can also enter an item description if desired.



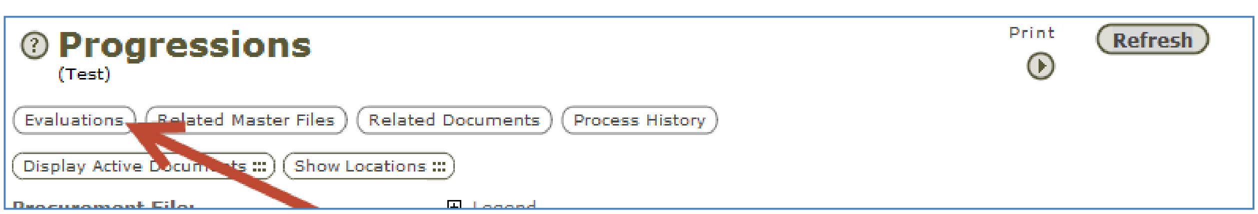
Continue entering prices on each of the items on the solicitation that the supplier has bid on by clicking “Next Item”. When you have finished adding item details, click **Next** to save and continue.

g. **Enter Prices** – You will see a list of all items and their associated prices. Confirm prices here and edit as needed. Click **Next** to save and continue.
h. **Attachments** - If you have any documents from the supplier that need to be attached, you can add them here by giving them a title and then using the “Browse” button to upload them from your files. Click **Next** to save and continue.
i. **Supplier Comments** – If there are any additional comments from the supplier you want to capture on the bid, add them here.
j. Click the **Finish** button.
k. **Response Receipt Info** – Before you issue the bid, you need to enter a few more pieces of information. Click on the “View Data” option in the menu bar and choose “Response Receipt Info”.
    i. **Receipt Date** – This should carry over from your initial entry of the bid.
    ii. **Receipt Time** – This should carry over from your initial entry of the bid.
    iii. **Summary Bid** – If you have entered individual items on prices, leave this set to “No”. If you want to enter just one grand total for everything and not list individual item prices, set this to “Complete” and ether the “Summary Bid Amount”.
    iv. **Evaluation Review** – Please indicate whether this bid meets requirements or not.
    v. **Bid Review Comment** – If you chose anything other than “Meets Requirements” in the prior field, please enter a comment to indicate what they were missing, etc.
    vi. Click **Submit** to save and continue.
l. Process the document through the workflow by clicking on **Complete Step** until you have issued the bid.

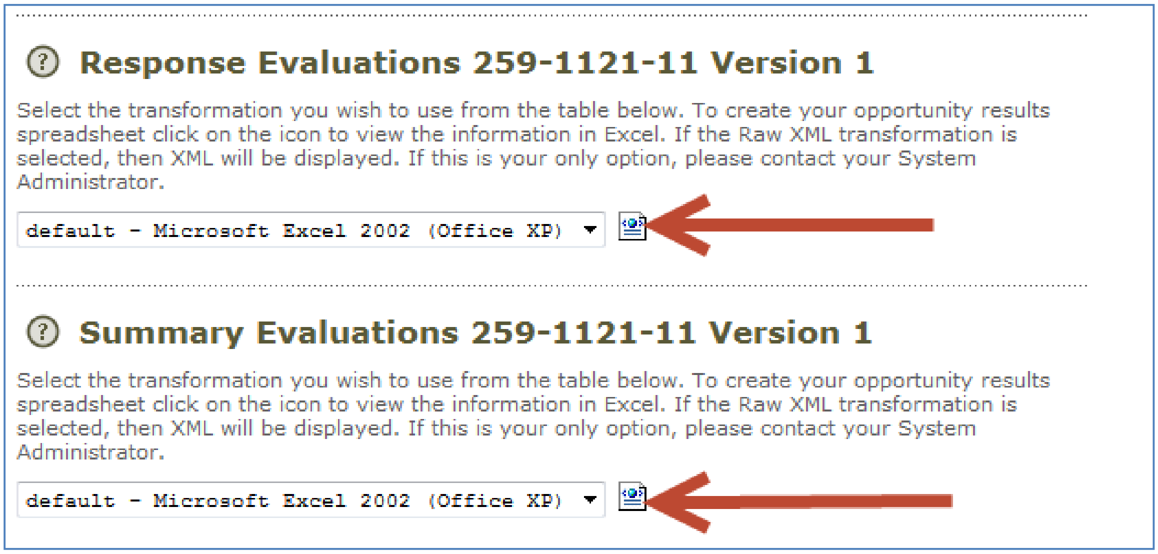
If a supplier submits an Electronic Bid (eBid) on a solicitation: The supplier will enter their prices, upload attachments, etc. You will not be able to their bid until after the opportunity closes. Once it closes, you will be allowed to view the bid details and evaluate it as needed.

VI. Creating Awards/Contracts:

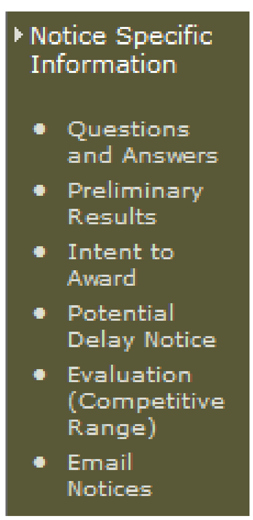
1. If you want ORPIN to create an Evaluation/Bid Tab Sheet, open the opportunity’s Progression screen. (If you are not going to create a tab sheet, skip to step #6 below.)
2. Click the **Evaluations** button in the upper left corner of the Progression screen to create your tab sheet.



3. Choose the type of evaluation sheet you want and click the icon to the right of it to create. (You can do this multiple times, so try each one and see which is more appropriate for what you are working on.)

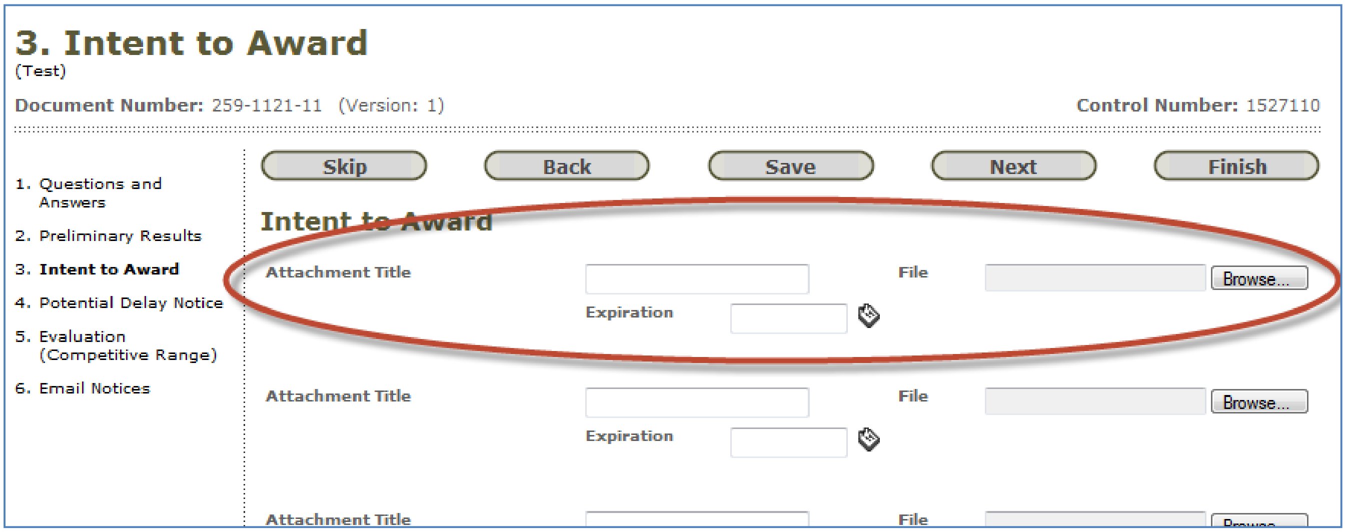


4. The Evaluations sheet will create. Save the document to your computer for future use.
5. If you would like to post the evaluation sheet, Preliminary Results, and Intent to Award or anything else on your solicitation for others to see, you can post it under **Notice Specific Information**.
   a. Pull up your closed solicitation document.
   b. Click on **Notice Specific Information** in the left-hand menu bar.
   c. Choose the most appropriate folder to post your document in. They all function the same, (except for the Questions and Answers folder. This folder is used prior to the solicitation closing as a way to share Q&A with your interested suppliers.)



   d. Click the folder you want to use.

e. Enter a title for the Attachment, and click the **Browse** button to locate it on your computer. If you would like the attachment to expire after a certain date, you can fill in the **Expiration** field. (This is OPTIONAL.) If you do use the Expiration date, the document will no longer be visible to the public/supplier community after the specified date, but it will remain attached internally for you to see.

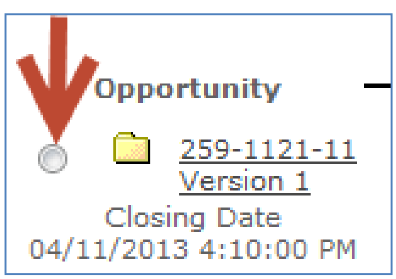


f. Click the **Finish** button when you are done.

IMPORTANT NOTE: The system will not automatically send emails to those suppliers on the Interested List unless you prompt it to. To prompt emails, click on **Notice Specific Information** in the menu bar again and choose **Email Notices**.

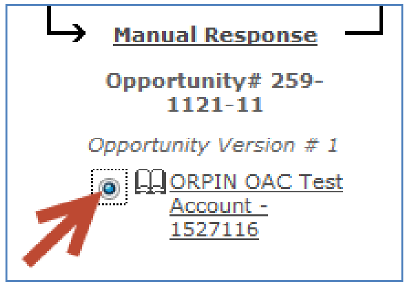
If you are attaching multiple documents into different folders in the Notice Specific area, wait until you are finished attaching them, and then click **Email Notices** once. It will send an email with a bulleted list of all folders containing new attachments to your suppliers.

6. When you are ready to enter the award, open the solicitation document and click on **View Data** in the menu bar.
7. Click on **Progression**.
8. You will see a progression screen displaying activities occurred within the master file.
9. Click on the radio button to the left of the Opportunity number.

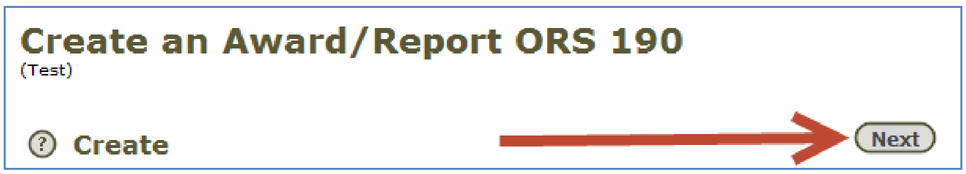


10. Click on the radio button next to the supplier's bid that you wish to progress.

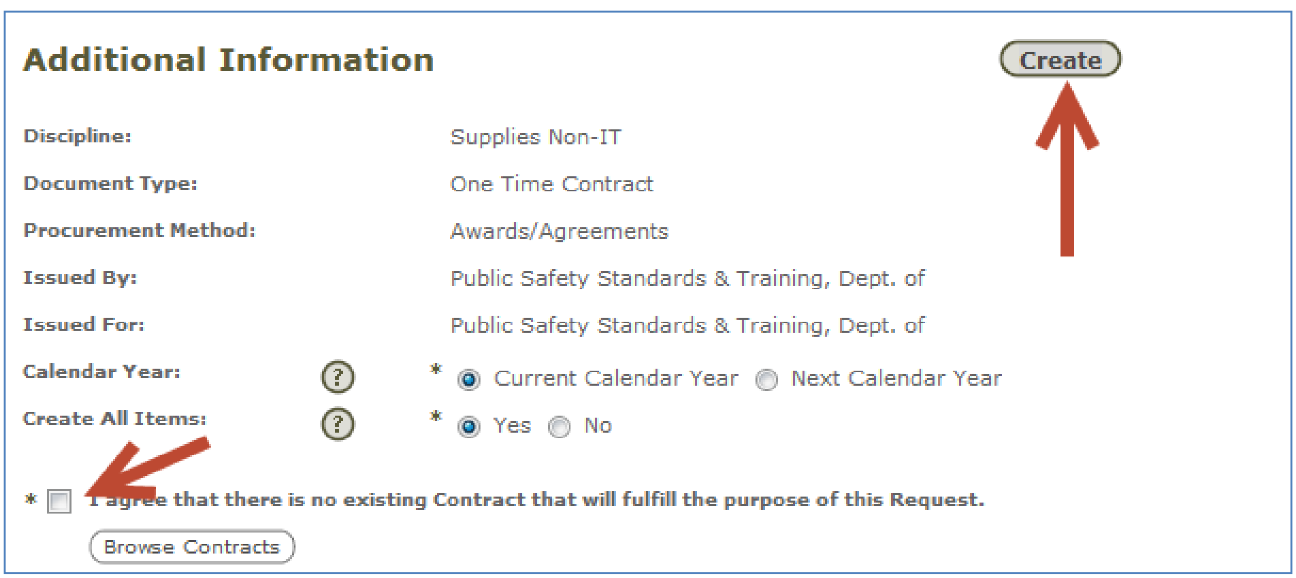
11. Click on the underlined word **Award** on the far right of the Progression screen.



12. **Create an Award/Report ORS 190** – Click the **Next** button to start the creation process.

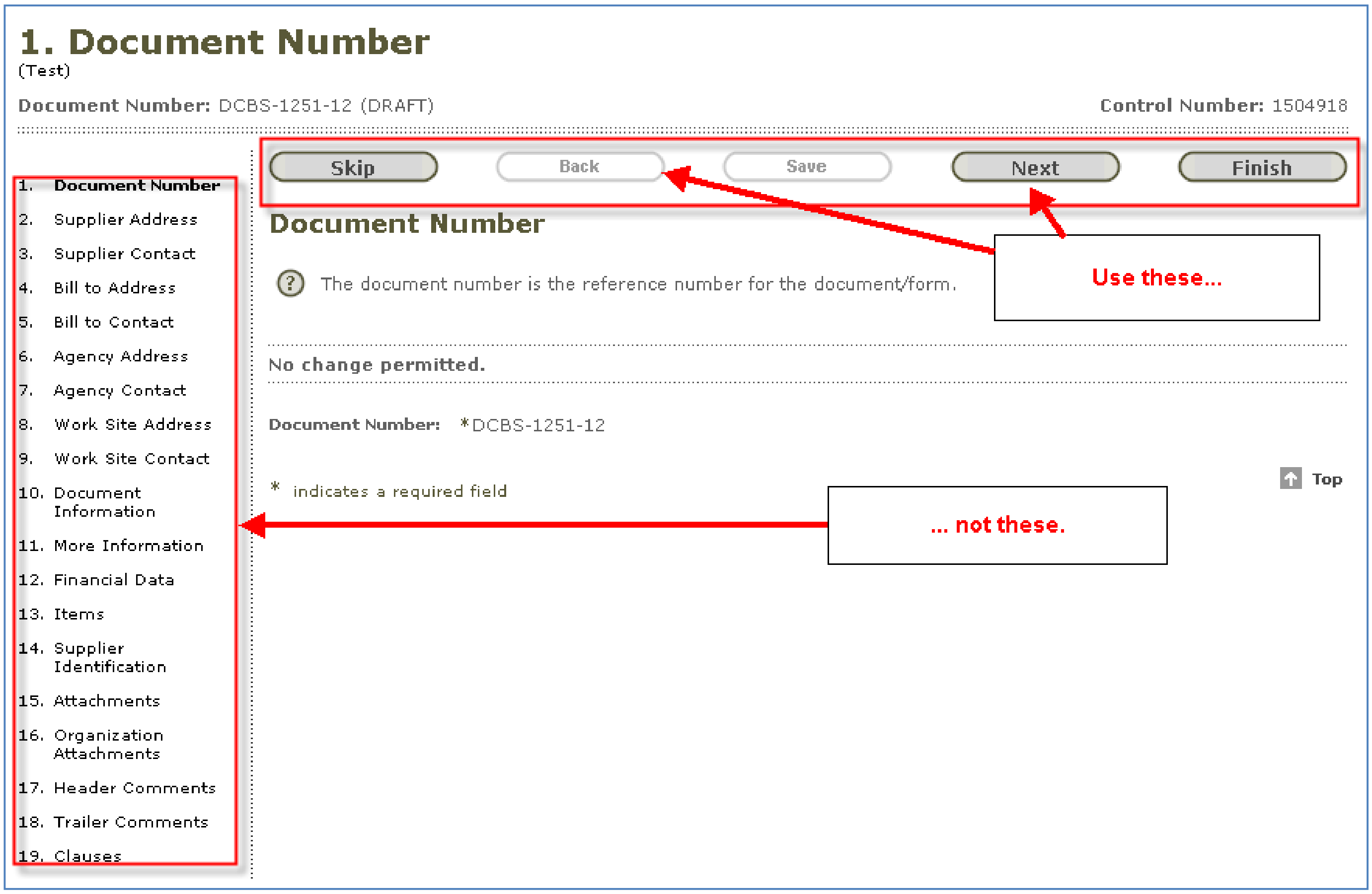


13. **Award Type** – Select the type of award you are going to create. Types will display based on the Discipline used in your solicitation process. Click on the radio button next to the appropriate type and click **Next** to continue.
14. **Additional Information** – Validate the information on the screen, and then choose whether you want to issue the award for the current calendar year or the next calendar year. Also, indicate whether you want all items to be brought over onto the contract.
15. **Agreement** – Check the box to confirm that there are no existing contracts that will fulfill the purpose of this request. (You may choose to click the **Browse Contracts** button to perform a contract search before checking this confirmation box.) When you are satisfied that there are none, check the box and click the **Create** button to continue.



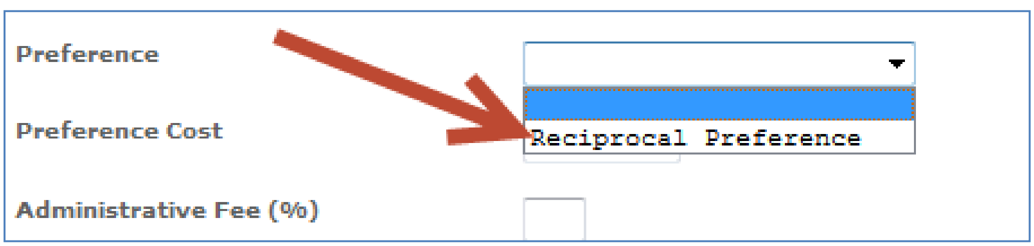
16. Click the **Continue** button to transfer into the Document Wizard, which will help you fill out the necessary information on your award.

    Once you are in the Document Wizard, you will see all of the information screens listed down the left hand side of the window. Do not use these links to navigate from screen to screen, as doing so does not have an 'auto-save' feature so the information you type in will be lost. Instead, move from screen to screen by clicking either the **Back** or **Next** buttons along the top of the window.



17. **Document Number** – Based on your agency's settings, the Document Number will either auto generate or be available for you to enter. (This field is required.) Click **Next** to save and continue.
18. **Supplier Address** – The supplier's address information should auto-populate based on their supplier registration. Update if needed, and then click **Next** to save and continue.
19. **Supplier Contact** – The supplier's contact information should auto-populate based on their supplier registration. Update if needed, and then click **Next** to save and continue.
20. **Contract Administrator Address** - The agency information should auto-populate. Update if needed, and then click **Next** to save and continue.
21. **Contract Administrator** – Select the appropriate administrator from the dropdown list. Click **Next** to save and continue.

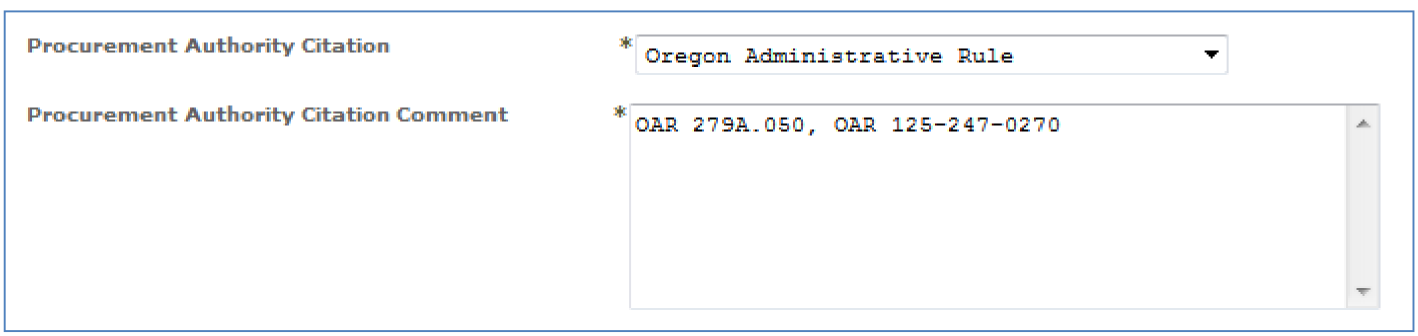
22. **Receiving Address** – This information should auto-populate. Update if needed, and then click **Next** to save and continue.
23. **Receiving Address Contact** – Select the person from the dropdown (or enter a new person in the fields below) to indicate who the contact person at the receiving address should be. Click **Next** to save and continue.
24. **Document Information** - Populate fields listed below. (Required fields are indicated with an asterisk.)
    a. **Contract Start Date** – Click the calendar icon to the right of the empty field to select a start date.
    b. **Expiration Date** – Click the calendar icon to the left of the empty field to select an expiration date.
    c. **Maximum Contract Term** – This is an optional field, but if you would like to indicate a maximum contract term date, click the calendar icon to the left of the empty field to select the date.
    d. **Estimated Contract Value** – Enter your best estimation of the total contract value in whole numbers.
    e. **Currency and Rate** – These fields auto-populate and should be left as is.
    f. **Document Title** – Enter a title for the contract.
    g. **Award allows PO's or Work Orders**? – This field only shows up on certain document types. If this is showing, please indicate whether the award should allow for Work Orders to be created against it.
    h. **Allow Item Import/Export?** – If you would like to be able to import or export items to the contract via an excel spreadsheet, click the Yes radio button.
    i. **Preference** – If Reciprocal Preference applies, choose it from the dropdown.



    j. **Administrative Fee (%)** – If the contract has VCAF and it is calculated by percentage, enter the VCAF percent here.
    k. **Administrative Fee ($)** – If the contract has VCAF and it is a flat dollar amount, enter the VCAF amount here.
    l. **Total Administrative Fee** – Leave this field blank.
    m. **Vendor Collected Administrative Fee** – Leave this field blank.
    n. **Number of days prior to contract Expiration to notify Buyer** – Indicate when you would like to receive a contract expiration notice email. It defaults to 60 days.
    o. **Number of days prior to insurance Expiration to notify Buyer** – Indicate when you would like to receive a contract insurance expiration notice email. It defaults to 30 days.
    p. **Resident Bidder** – This field should auto-generate based on what was entered on the supplier's bid response. Confirm that setting is correct.

q. **Maximum # of Items to display in Item Block** – Leave this field blank.
r. Click **Next** to save and continue.

25. **More Information** - Populate fields listed below. (Required fields are indicated with an asterisk.)
    a. **Mandatory or Convenience** – Indicate whether the contract is mandatory for use or a convenience. Refer to OAR 125-247-0296 for more information.
    b. **Renewal Option** – Enter any renewal option information you would like to keep here.
    c. **Warranty** – Enter warranty information here.
    d. **Minimum Order** – If there are minimum order requirements, indicate this here. If not, enter "N/A".
    e. **Delivery Requirements** – This defaults to "30 days after purchase order is issued". If desired, you may choose a different option from the dropdown.
    f. **FOB** – Select the appropriate Freight on Board description.
    g. **Freight/Surcharge if minimum order value not met** – Enter as appropriate.
    h. **Delivery Comments** – Enter as appropriate.
    i. **Best Value Analysis** – Enter as appropriate.
    j. **Return Policy** – Describe the return policy for the contract items. You can enter "N/A" if the contract is for services and there is no return policy.
    k. **Payment Terms** – This defaults to Net 45, but you may change this if desired.
    l. **Payment Terms Comments** – Provide additional payment term details if needed.
    m. **Procurement Authority Citation** – Indicate where your procurement authority for this contract comes from.
    n. **Procurement Authority Citation Comment** – Cite the actual rule, etc which gives you your procurement authority.

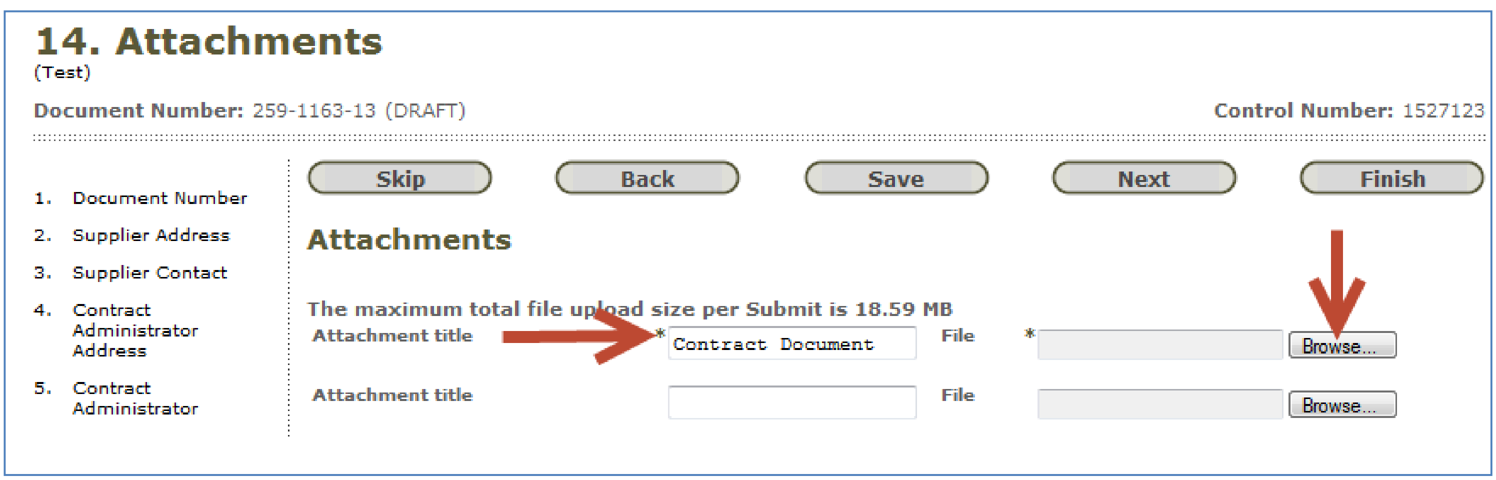


    o. **Special Procurement/Exemption** – If this award was the result of a special procurement or exemption, please indicate this by choosing from the dropdown.
    p. **Special Procurement/Exemption Citation** – If this award was the result of a special procurement or exemption, please cite the procurement or exemption number here.
    q. **Contract Filed At** – How you populate this field is extremely important. It controls which agency will be able to make changes to the documents within the

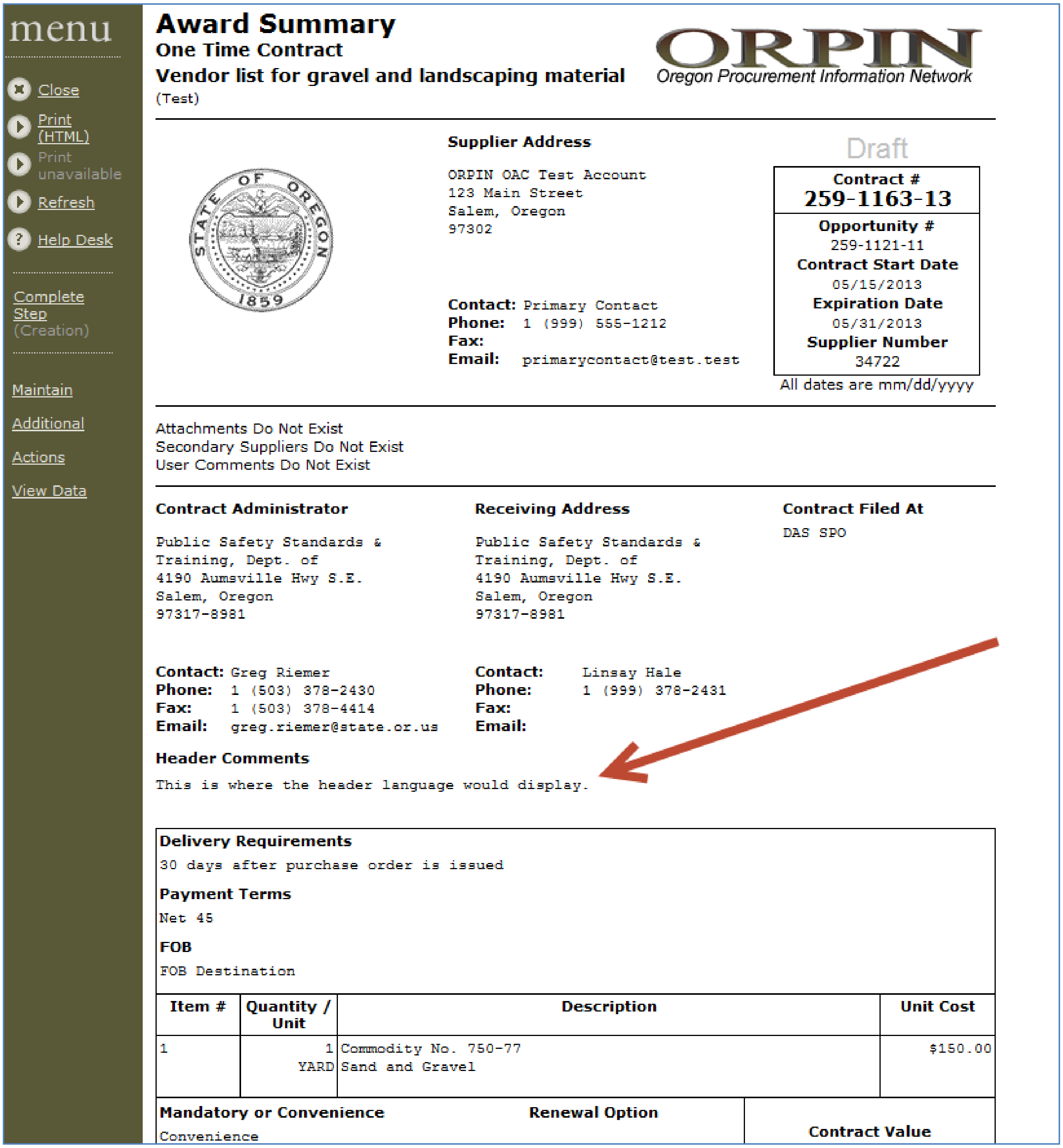
master file going forward. Please indicate whether DAS SPO or the Agency will maintain control of the procurement file going forward.

r. **Assigned Mentor** – If you worked with a mentor during this procurement and would like to note this, enter the mentor's name here.
s. **DOJ Assigned Attorney** – If you would like to track which DOJ attorney you worked with on this procurement, list it here.
t. Click **Next** to save and continue.

26. **Financial Data** – This is an optional area where you could track accounting numbers if desired. Click **Next** to save and continue.
27. **Item** – The information you entered on the bid should be in the Items area already, but you have the ability to add others here. If you want to add an item, enter a search keyword or code and click on the appropriate commodity in the results list. This will move the commodity to the right side of the screen, where you can then enter a Quantity, Unit of Measure (UOM), Unit Price, and Description. Click **Next** to save and continue once you finish adding items.
28. **Supplier Insurance** – If you want ORPIN to track the supplier's insurance, you can enter an Expiration Date (click on the calendar icon to choose the date) and then choose the insurance type from the dropdown. If you do not want ORPIN to track the insurance, check the box titled "Insurance is Not Required". Click **Next** to save and continue once you finish adding items.
29. **Supplier Identification** – You are required to enter either a Federal Tax ID number (FIN) or Social Security Number (SSN). It is HIGHLY recommended to use FIN whenever possible; however if the SSN must be used ORPIN does encrypt this information for security purposes. Click **Next** to save and continue.
30. **Attachments** – Load any attachments that you would like to post on the contract file by entering an Attachment Title and then clicking the Browse button to locate the file on your computer. For example, you may choose to upload a copy of the actual contract document (be sure to black out or remove any personal identification numbers or other confidential information- remember all suppliers and internal agency users can view contract attachments), specific ordering instructions, etc. Click **Next** to save and continue once you finish adding attachments.



31. **Organization Attachments** – If this page displays, you do not need to load anything on this page. By default, it contains the State of Oregon seal, which will display on the Award Summary page. Click **Next** to save and continue.
32. **Header Comments** – Enter language that should show up in the header section of the Award Summary contract document in ORPIN. Click **Next** to save and continue.



menu

Close

Print (HTML)

Print unavailable

Refresh

Help Desk

Complete Step (Creation)

Maintain

Additional

Actions

View Data

Award Summary

One Time Contract

Vendor list for gravel and landscaping material

(Test)

ORPIN

Oregon Procurement Information Network

STATE OF OREGON 1859

Supplier Address

ORPIN OAC Test Account
123 Main Street
Salem, Oregon
97302

Contact: Primary Contact
Phone: 1 (999) 555-1212
Fax:
Email: primarycontact@test.test

Draft

Contract #
259-1163-13
Opportunity #
259-1121-11
Contract Start Date
05/15/2013
Expiration Date
05/31/2013
Supplier Number
34722

All dates are mm/dd/yyyy

Attachments Do Not Exist
Secondary Suppliers Do Not Exist
User Comments Do Not Exist

Contract Administrator

Public Safety Standards &
Training, Dept. of
4190 Aumsville Hwy S.E.
Salem, Oregon
97317-8981

Contact: Greg Riemer
Phone: 1 (503) 378-2430
Fax: 1 (503) 378-4414
Email: greg.riemer@state.or.us

Receiving Address

Public Safety Standards &
Training, Dept. of
4190 Aumsville Hwy S.E.
Salem, Oregon
97317-8981

Contact: Linsay Hale
Phone: 1 (999) 378-2431
Fax:
Email:

Contract Filed At

DAS SPO

Header Comments

This is where the header language would display.

Delivery Requirements

30 days after purchase order is issued

Payment Terms

Net 45

FOB

FOB Destination

Item #	Quantity / Unit	Description	Unit Cost
1	1 YARD	Commodity No. 750-77 Sand and Gravel	$150.00

Mandatory or Convenience Convenience

Renewal Option

Contract Value

33. **Trailer Comments -** Enter language that should show up in the Trailer Comments section of the contract document in ORPIN. Click **Next** to save and continue.

Delivery Requirements

30 days after purchase order is issued

Payment Terms

Net 45

FOB

FOB Destination

Item #	Quantity / Unit	Description	Unit Cost
1	1 YARD	Commodity No. 750-77 Sand and Gravel	$150.00

Mandatory or Convenience	Renewal Option	Contract Value
Convenience		
Minimum Order		
N/A		
Return Policy		
N/A		
Warranty		$40,000
N/A		
Best Value Analysis		
Freight / Surcharge		

Trailer Comments

This is where the Trailer Comments would display.

Control # 1527123

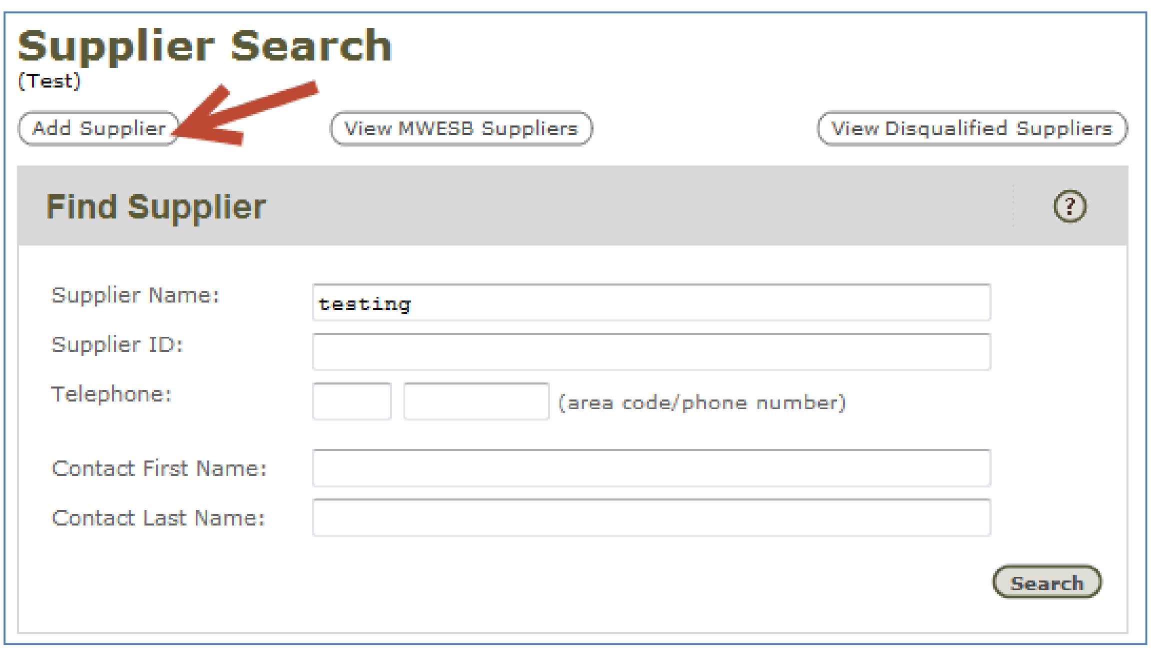
34. **Clauses** – If this page displays, you do not need to fill anything in on it. Just click **Next** to save and continue.
35. **Commodity Match** – This is an area for you to enter additional commodities as a cross-reference when people do searches for contracts. It is an optional page. You may add commodities here, or just click the **Finish** button.
36. In order for you to publish your contract, you must process it through the workflow.
    a. Begin by clicking **Complete Step (Creation)** in the menu bar.
        i. If your opportunity is missing any required information, you will receive an "Integrity Check Failed" message outlining what is missing.
        ii. Click on the underlined location and fill in the missing information.
        iii. Once all of the information is populated, you can click on **Complete Step (Creation)** again.

b. The next step in the workflow will display. Click the dropdown box and choose the name of the person who will process the next step. If you plan on completing the workflow yourself, choose your own name in the dropdown. *Note: Some steps in ORPIN are conditional based on the type of procurement and the dollar value so the workflow steps you see may vary based on the solicitation.*

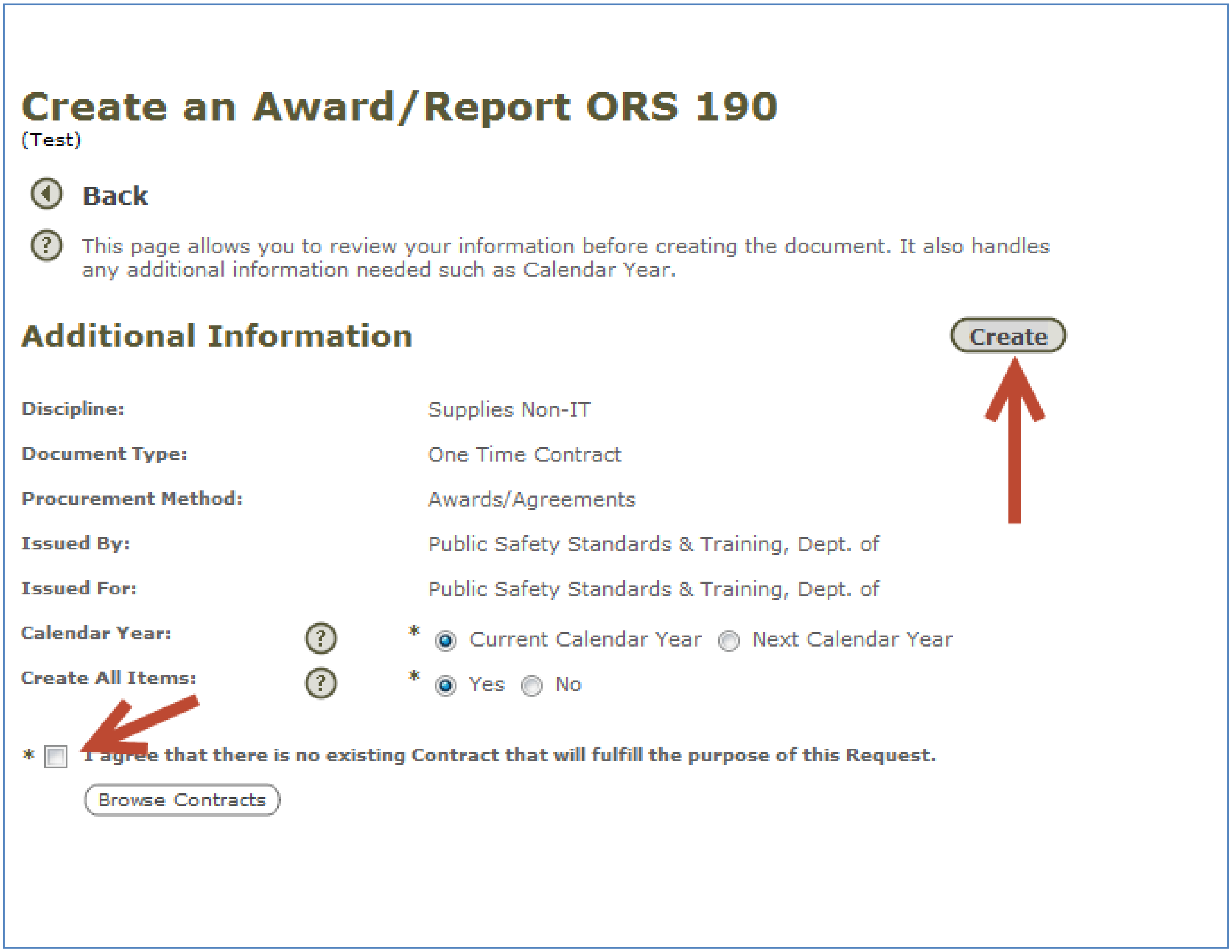
c. Continue clicking on the **Complete Step** button until you have issued the document or assigned it to someone else to complete.

VII. Entering Direct Awards:

1. Click on **Create Documents** in the menu bar.
2. Click on **Create an Award / Report ORS190**.
13. **Discipline** – Choose the radio button next to the most appropriate Discipline for the purchase. (See ORS 279A.010 for more information on definitions of Public Contracting Code.) Click **Next** to continue.
3. **Award Type** – Select the type of award you are going to create. Types will display based on the Discipline you selected in the previous step. Click on the radio button next to the appropriate type and click **Next** to continue.
4. **Organizations** – Choose the Issued By and Issued For agencies from the dropdowns. Then click the **Supplier** button to locate the supplier you are awarding to.
    a. **Search for Supplier** – Enter a piece of supplier information and click the **Search** button to locate the supplier.
    b. **Enter New Suppliers** – If the supplier you are awarding to is not in the system, you need to first perform the search (detailed in the previous step) and then the **Add Supplier** button will appear. This will allow you to build an account for the supplier if they are not previously registered in ORPIN.

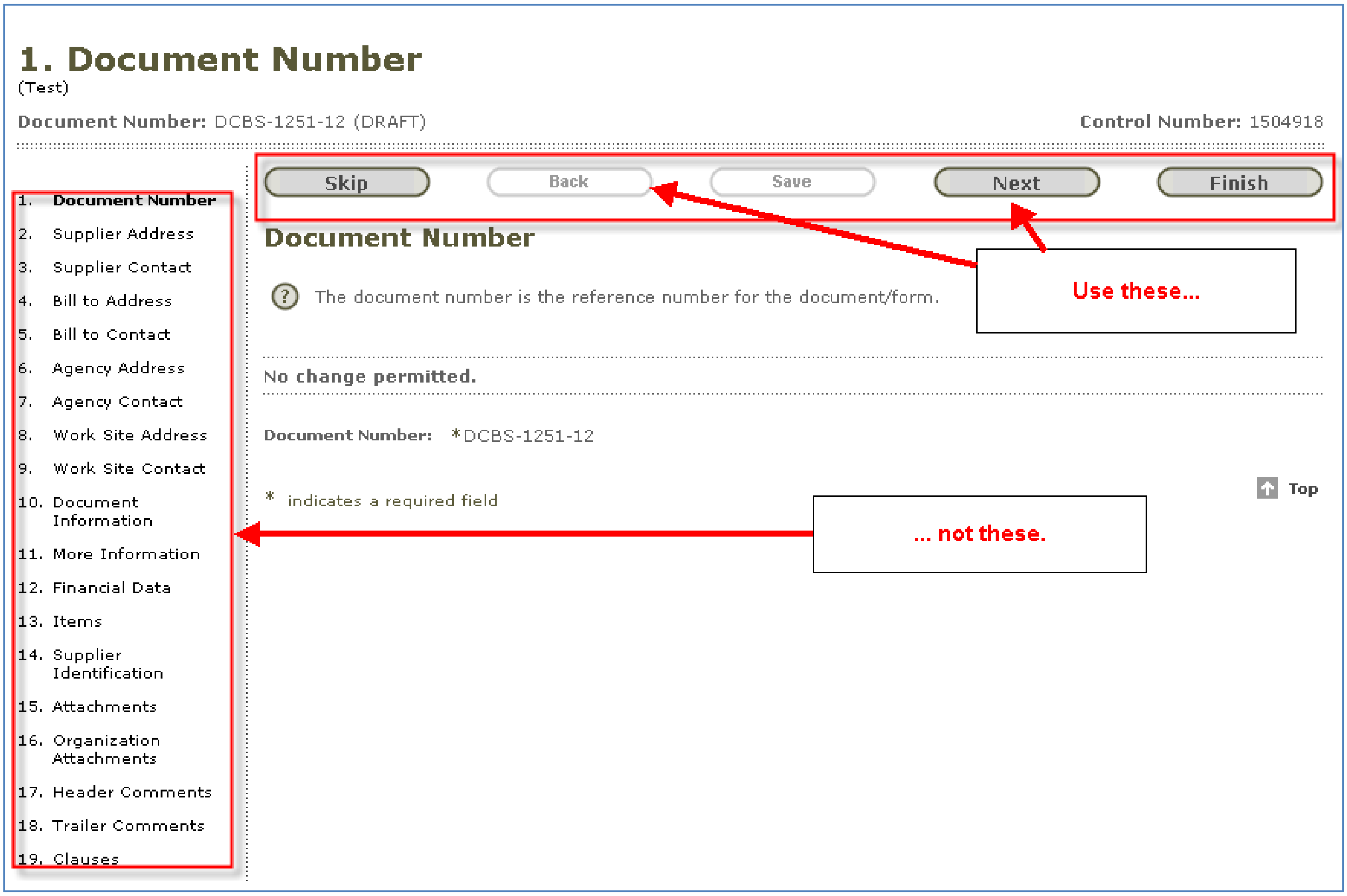


5. **Additional Information** – Validate the information on the screen, and then choose whether you want to issue the award for the current calendar year or the next calendar year. Also, indicate whether you want all items to be brought over onto the contract.
6. **Agreement** – Check the box to confirm that there are no existing contracts that will fulfill the purpose of this request. (You may choose to click the **Browse Contracts** button to perform a contract search before checking this confirmation box.) When you are satisfied that there are none, check the box and click the **Create** button to continue.



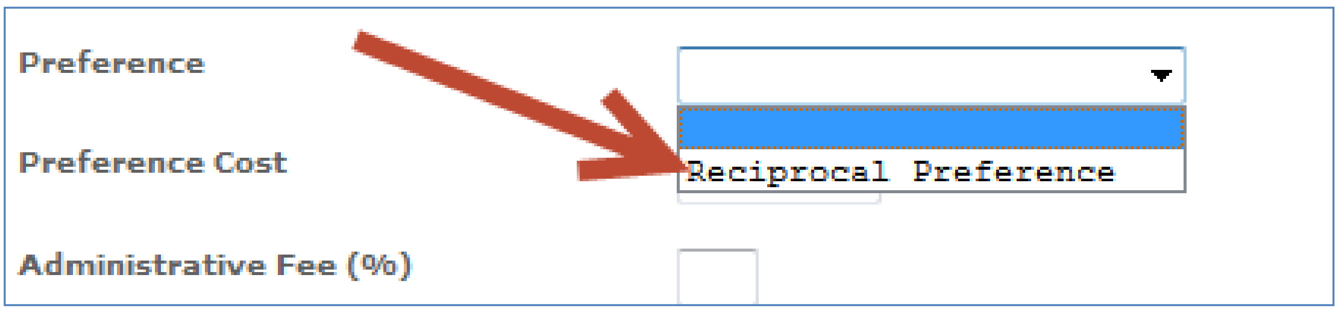
7. Click the **Continue** button to transfer into the Document Wizard, which will help you fill out the necessary information on your award.

   Once you are in the Document Wizard, you will see all of the information screens listed down the left hand side of the window. Do not use these links to navigate from screen to screen, as doing so does not have an 'auto-save' feature so the information you type in will be lost. Instead, move from screen to screen by clicking either the **Back** or **Next** buttons along the top of the window.



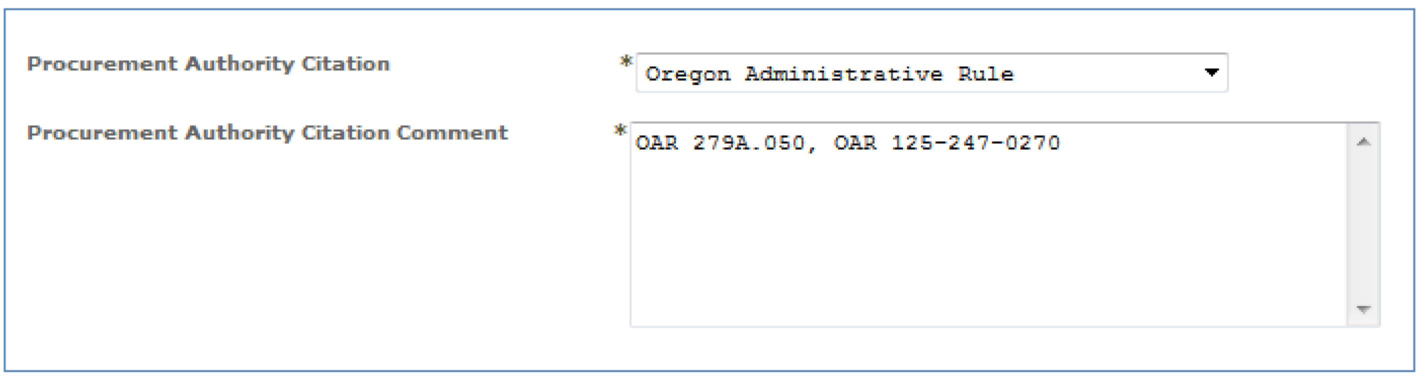
8. **Document Number** – Based on your agency's settings, the Document Number will either auto generate or be available for you to enter. (This field is required.) Click **Next** to save and continue.
9. **Supplier Address** – The supplier's address information should auto-populate based on their supplier registration. Update if needed, then click **Next** to save and continue.
10. **Supplier Contact** – The supplier's contact information should auto-populate based on their supplier registration. Update if needed, then click **Next** to save and continue.
11. **Contract Administrator Address** - The agency information should auto-populate. Update if needed, then click **Next** to save and continue.
12. **Contract Administrator** – Select the appropriate administrator from the dropdown list. Click **Next** to save and continue.
13. **Receiving Address** – This information should auto-populate. Update if needed, then click **Next** to save and continue.
14. **Receiving Address Contact** – Select the person from the dropdown (or enter a new person in the fields below) to indicate who the contact person at the receiving address should be. Click **Next** to save and continue.

15. **Document Information** - Populate fields listed below. (Required fields are indicated with an asterisk.)
    a. **Contract Start Date** – Click the calendar icon to the right of the empty field to select a start date.
    b. **Expiration Date** – Click the calendar icon to the left of the empty field to select an expiration date.
    c. **Maximum Contract Term** – This is an optional field, but if you would like to indicate a maximum contract term date, click the calendar icon to the left of the empty field to select the date.
    d. **Estimated Contract Value** – Enter your best estimation of the total contract value in whole numbers.
    e. **Currency and Rate** – These fields auto-populate and should be left as is.
    f. **Document Title** – Enter a title for the contract.
    g. **Award allows PO's or Work Orders**? – This field only shows up on certain document types. If this is showing, please indicate whether the award should allow for Work Orders to be created against it.
    h. **Allow Item Import/Export?** – If you would like to be able to import or export items to the contract via an excel spreadsheet, click the Yes radio button.
    i. **Preference** – If Reciprocal Preference applies, choose it from the dropdown.



    j. **Administrative Fee (%)** – If the contract has VCAF and it is calculated by percentage, enter the VCAF percent here.
    k. **Administrative Fee ($)** – If the contract has VCAF and it is a flat dollar amount, enter the VCAF amount here.
    l. **Total Administrative Fee** – Leave this field blank.
    m. **Vendor Collected Administrative Fee** – Leave this field blank.
    n. **Number of days prior to contract Expiration to notify Buyer** – Indicate when you would like to receive a contract expiration notice email. It defaults to 60 days.
    o. **Number of days prior to insurance Expiration to notify Buyer** – Indicate when you would like to receive a contract insurance expiration notice email. It defaults to 30 days.
    p. **Resident Bidder** – This field should auto-generate based on what was entered on the supplier's bid response. Confirm that setting is correct.
    q. **Maximum # of Items to display in Item Block** – Leave this field blank.
    r. Click **Next** to save and continue.

16. **More Information** - Populate fields listed below. (Required fields are indicated with an asterisk.)
    a. **Mandatory or Convenience** – Indicate whether the contract is mandatory for use or a convenience. Refer to OAR 125-247-0296 for more information.
    b. **Renewal Option** – Enter any renewal option information you would like to post.
    c. **Warranty** – Enter warranty information here.
    d. **Minimum Order** – If there are minimum order requirements, indicate this here. If not, enter “N/A”.
    e. **Delivery Requirements** – This defaults to “30 days after purchase order is issued”. If desired, you may choose a different option from the dropdown.
    f. **FOB** – Select the appropriate Freight on Board description.
    g. **Freight/Surcharge if minimum order value not met** – Enter as appropriate.
    h. **Delivery Comments** – Enter as appropriate.
    i. **Best Value Analysis** – Enter as appropriate.
    j. **Return Policy** – Describe the return policy for the contract items. You can enter “N/A” if the contract is for services and there is no return policy.
    k. **Payment Terms** – This defaults to Net 45, but you may change this if desired.
    l. **Payment Terms Comments** – Provide additional payment term details here.
    m. **Procurement Authority Citation** – Indicate where your procurement authority for this contract comes from.
    n. **Procurement Authority Citation Comment** – Cite the actual rule, etc which gives you your procurement authority.

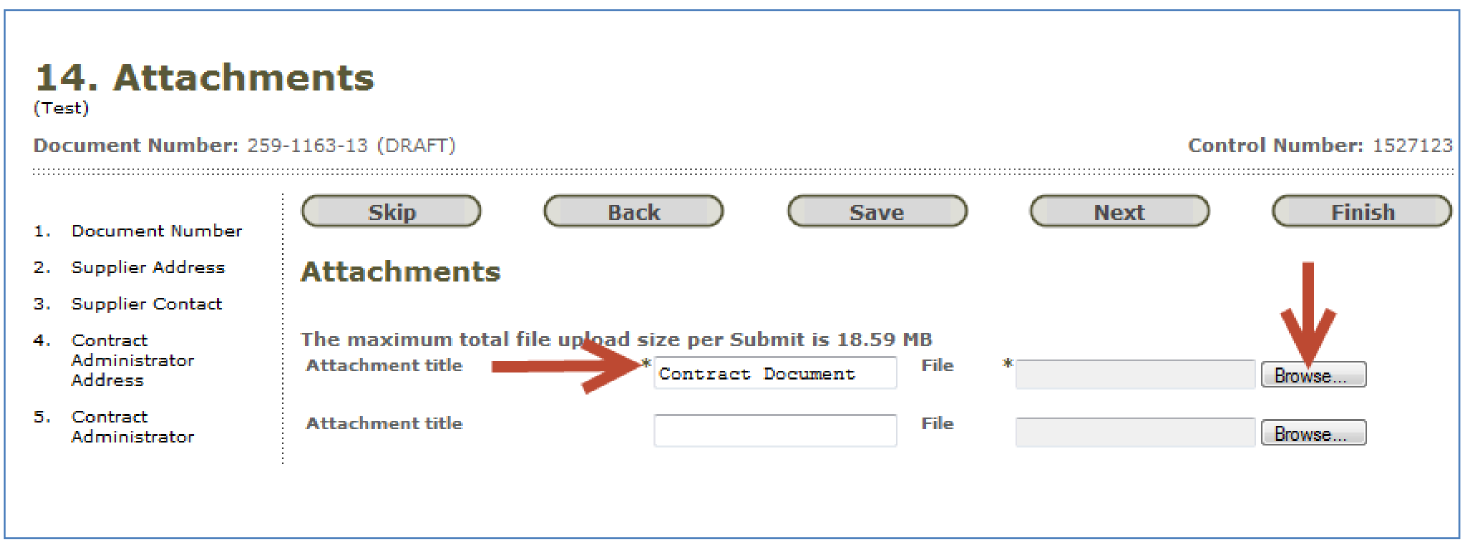


    o. **Special Procurement/Exemption** – If this award was the result of a special procurement or exemption, please indicate this by choosing from the dropdown.
    p. **Special Procurement/Exemption Citation** – If the award was the result of a special procurement or exemption, please cite the procurement or exemption number here.
    q. **Contract Filed At** – How you populate this field is extremely important. It controls which agency will be able to make changes to the documents within the master file going forward. Please indicate whether DAS SPO or the Agency will maintain control of the procurement file going forward.
    r. **Assigned Mentor** – If you worked with a mentor during this procurement and would like to note this, enter the mentor’s name here.

s. **DOJ Assigned Attorney** – If you would like to track which DOJ attorney you worked with on this procurement, list it here.

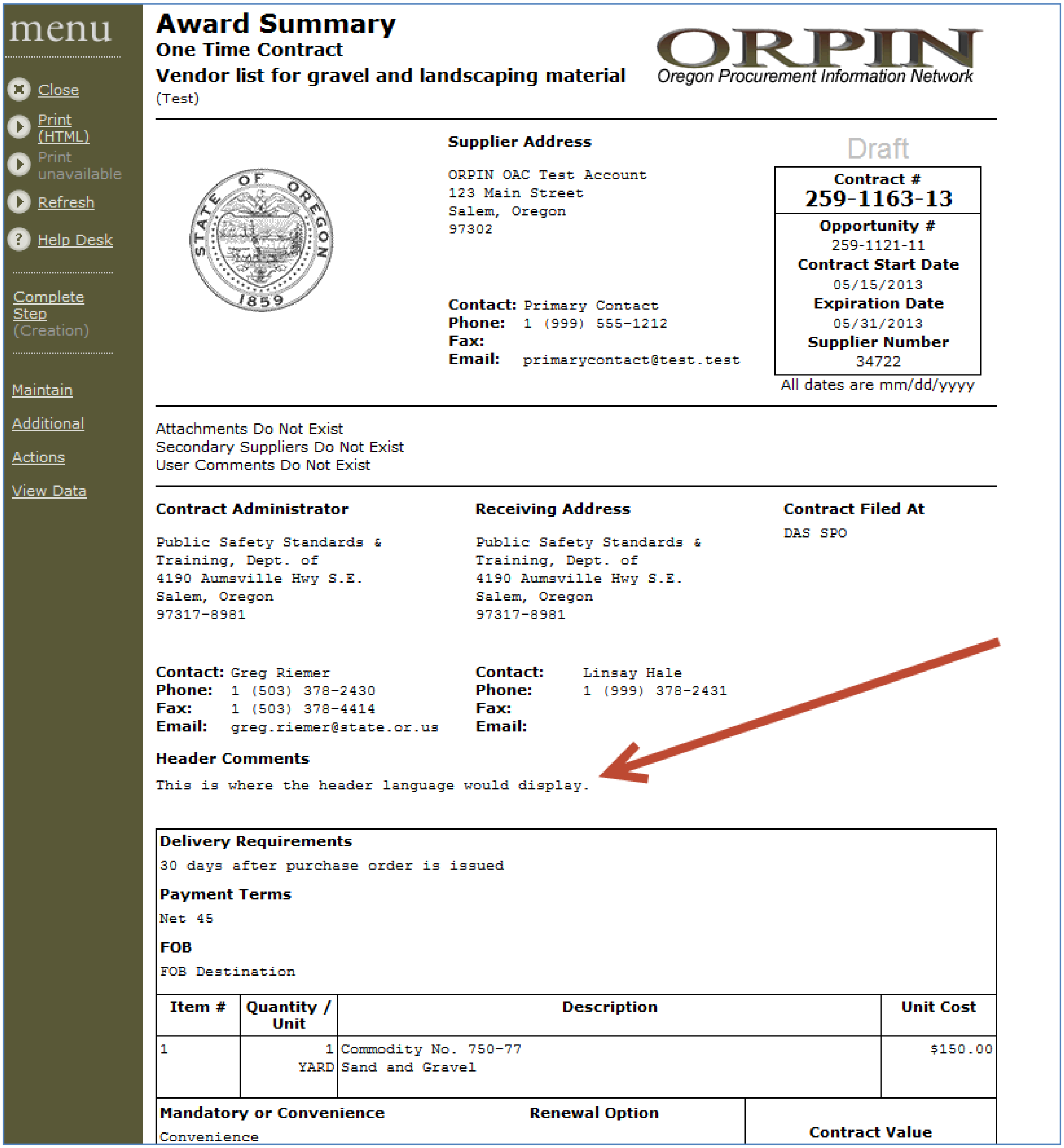
t. Click **Next** to save and continue.

17. **Financial Data** – This is an optional area where you could track accounting numbers if desired. Click **Next** to save and continue.
18. **Item** – Enter the contract items. To add an item, enter a search keyword or code and click on the appropriate commodity in the results list. This will move the commodity to the right side of the screen, where you can then enter a Quantity, Unit of Measure (UOM), Unit Price, and Description. Repeat until all items are listed. Click **Next** to save and continue.
19. **Supplier Insurance** – If you want ORPIN to track the supplier's insurance, you can enter an Expiration Date (click on the calendar icon to choose the date) and then choose the insurance type from the dropdown. If you do not want ORPIN to track the insurance, check the box titled "Insurance is Not Required". Click **Next** to save and continue.
20. **Supplier Identification** – You are required to enter either a Federal Tax ID number (FIN) or Social Security Number (SSN). It is HIGHLY recommended to use FIN whenever possible; however if the SSN must be used the system does encrypt this information for security purposes. Click **Next** to save and continue.
21. **Attachments** – Load any attachments that you would like to post on the contract file by entering an Attachment Title and then clicking the Browse button to locate the file on your computer. For example, you may choose to upload a copy of the actual contract document (please black out or remove any personal identification numbers or other confidential information- remember all suppliers and internal agency users can view contract attachments). Click **Next** to save and continue.



22. **Organization Attachments** – If this page displays, you do not need to load anything on this page. By default, it contains the State of Oregon seal, which will display on the Award Summary page. Click **Next** to save and continue.

23. **Header Comments** – Enter language that should show up in the header section of the Award Summary contract document in ORPIN. Click **Next** to save and continue.


menu

Close

Print (HTML)

Print unavailable

Refresh

Help Desk

Complete Step (Creation)

Maintain

Additional

Actions

View Data

Award Summary

One Time Contract

Vendor list for gravel and landscaping material

(Test)

ORPIN

Oregon Procurement Information Network

STATE OF OREGON 1859

Supplier Address

ORPIN OAC Test Account
123 Main Street
Salem, Oregon
97302

Contact: Primary Contact
Phone: 1 (999) 555-1212
Fax:
Email: primarycontact@test.test

Draft

Contract #
259-1163-13
Opportunity #
259-1121-11
Contract Start Date
05/15/2013
Expiration Date
05/31/2013
Supplier Number
34722

All dates are mm/dd/yyyy

Attachments Do Not Exist
Secondary Suppliers Do Not Exist
User Comments Do Not Exist

Contract Administrator

Public Safety Standards &
Training, Dept. of
4190 Aumsville Hwy S.E.
Salem, Oregon
97317-8981

Contact: Greg Riemer
Phone: 1 (503) 378-2430
Fax: 1 (503) 378-4414
Email: greg.riemer@state.or.us

Receiving Address

Public Safety Standards &
Training, Dept. of
4190 Aumsville Hwy S.E.
Salem, Oregon
97317-8981

Contact: Linsay Hale
Phone: 1 (999) 378-2431
Fax:
Email:

Contract Filed At

DAS SPO

Header Comments

This is where the header language would display.

Delivery Requirements

30 days after purchase order is issued

Payment Terms

Net 45

FOB

FOB Destination

Item #	Quantity / Unit	Description	Unit Cost
1	1 YARD	Commodity No. 750-77 Sand and Gravel	$150.00

Mandatory or Convenience | **Renewal Option** | **Contract Value**

Convenience

24. **Trailer Comments -** Enter language that should show up in the Trailer Comments section of the contract document in ORPIN. Click **Next** to save and continue.

Delivery Requirements

30 days after purchase order is issued

Payment Terms

Net 45

FOB

FOB Destination

Item #	Quantity / Unit	Description	Unit Cost
1	1 YARD	Commodity No. 750-77 Sand and Gravel	$150.00

Mandatory or Convenience Convenience **Renewal Option**	**Contract Value**
Minimum Order N/A	
Return Policy N/A	
Warranty N/A	$40,000
Best Value Analysis	
Freight / Surcharge	

Trailer Comments

This is where the Trailer Comments would display.

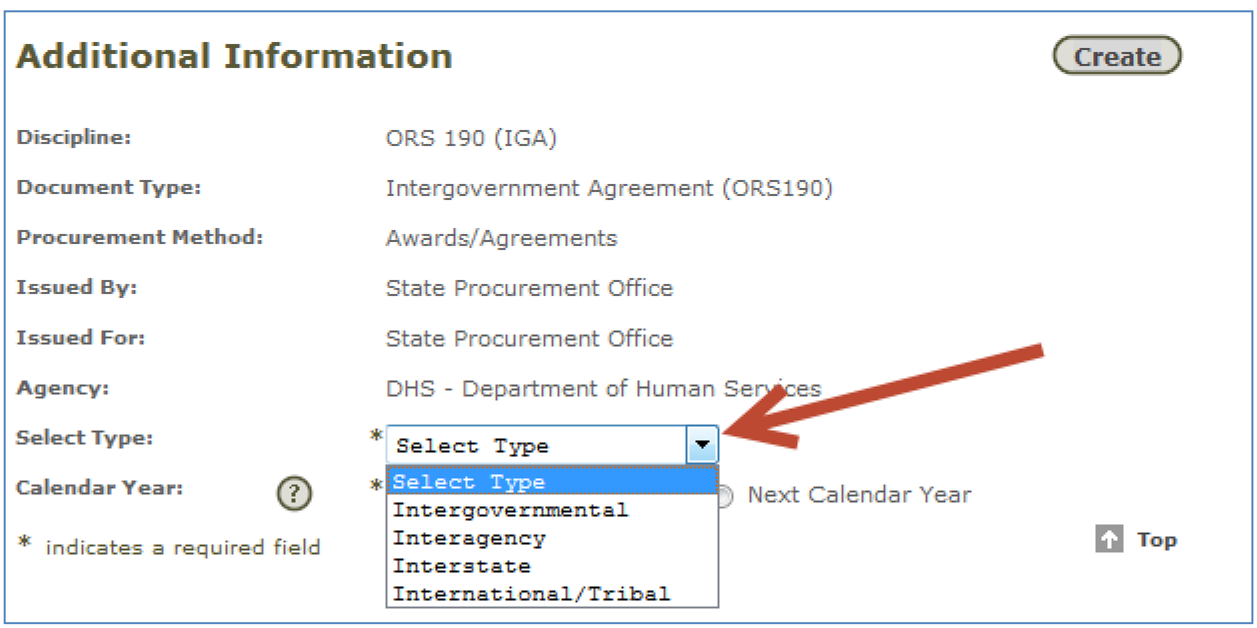
Control # 1527123

25. **Clauses** – If this page displays, you do not need to fill anything in on it. Just click **Next** to save and continue.
26. **Commodity Match** – This is an area for you to enter additional commodities as a cross-reference when people do searches for contracts. It is an optional page. You may add commodities here, or just click the **Finish** button.
27. In order for you to publish your contract, you must process it through the workflow.
    a. Begin by clicking **Complete Step (Creation)** in the menu bar.
        i. If your opportunity is missing any required information, you will receive an "Integrity Check Failed" message outlining what is missing.
        ii. Click on the underlined location and fill in the missing information.
        iii. Once all of the information is populated, you can click on **Complete Step (Creation)** again.

   b. The next step in the workflow will display. Click the dropdown box and choose the name of the person who will process the next step. If you plan on completing the workflow yourself, choose your own name in the dropdown. *Note: Some steps in ORPIN are conditional based on the type of procurement and the dollar value so the workflow steps you see may vary based on the solicitation.*
   c. Continue clicking on the **Complete Step** button until you have issued the document or assigned it to someone else to complete.

VII. Entering ORS190 Agreements:

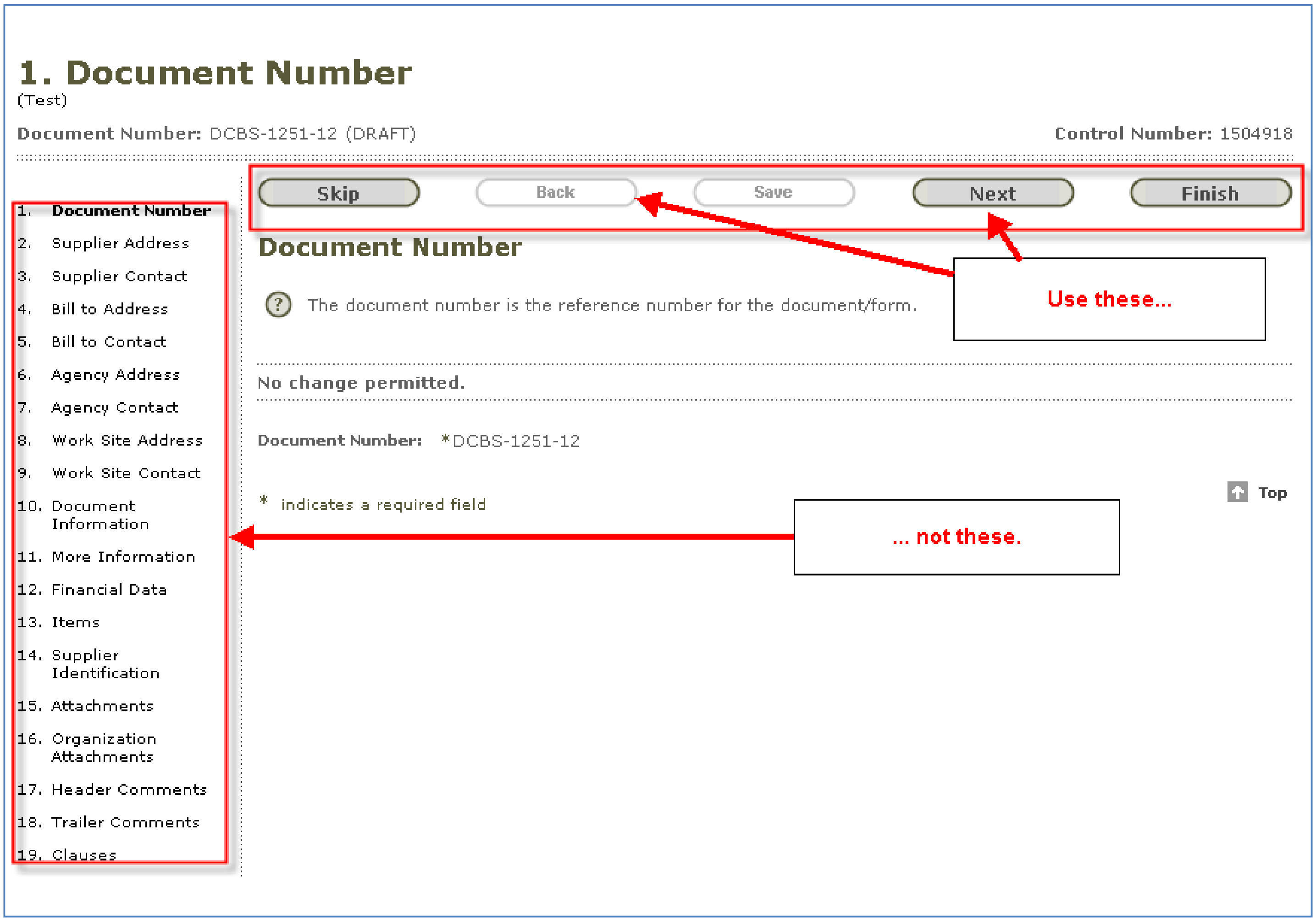
1. Click on **Create Documents** in the menu bar.
2. Click on **Create an Award / Report ORS190**.
3. **Discipline** – Select the radio button by "ORS 190 (IGA)" and click **Next** to continue.
4. **Organizations** – Choose the Issued By and Issued For agencies from the dropdowns. Click the **Agency** button to locate the agency you are entering into an agreement with.
   a. **Search for Organization** – Enter the agency's name and click the Search button to locate them.
   b. **Entering New Organizations** – If the agency you are awarding to is not in the system, you need to request that they be built. Send an email to the ORPIN Help Desk at info.orpin@state.or.us requesting that they build the agency in ORPIN. They will need the agency's name, address, and federal tax id number (if available).
   c. Click **Next** to continue.
5. **Additional Information** – Validate the information on the screen, and then choose the ORS 190 Agreement type from the dropdown.



Indicate whether you want to issue the agreement for the current calendar year or the next calendar year. Click **Create** to continue.

14. Click the **Continue** button to transfer into the Document Wizard, which will help you fill out the necessary information on your agreement.

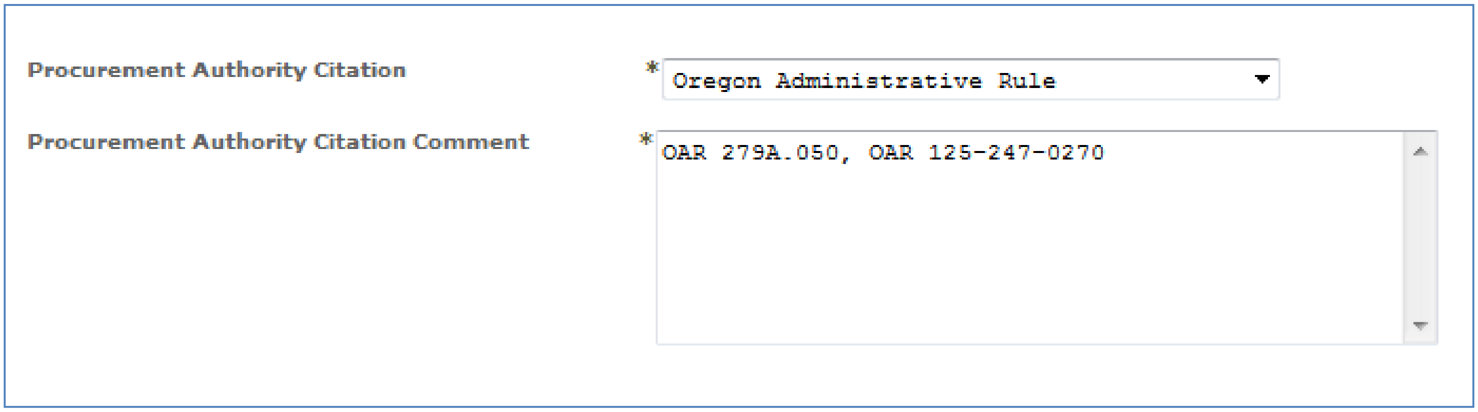
    Once you are in the Document Wizard, you will see all of the information screens listed down the left hand side of the window. Do not use these links to navigate from screen to screen, as doing so does not have an ‘auto-save’ feature so the information you type in will be lost. Instead, move from screen to screen by clicking either the **Back** or **Next** buttons along the top of the window.



6. **Document Number** – Based on your agency’s settings, the Document Number will either auto generate or be available for you to enter. (This field is required.) Click **Next** to save and continue.
7. **Secondary Organization Address** – The address for the agency that you are going into agreement with should auto-populate based on their agency account. Update if needed, then click **Next** to save and continue.

8. **Secondary Organization Contact** – Available contacts for the agency you are going into agreement with should auto-populate in the dropdown. Select a contact or enter one in the fields below, then click **Next** to save and continue.
9. **Agreement Administrator Address** - Your agency information should auto-populate. Update if needed, then click **Next** to save and continue.
10. **Agreement Administrator** – Select the appropriate administrator from the dropdown list. Click **Next** to save and continue.
11. **Primary Organization Address** – This information should auto-populate. Update if needed, then click **Next** to save and continue.
12. **Primary Organization Contact** – Select the person from the dropdown (or enter a new person in the fields below) to indicate who the contact person at the Primary Organization should be. Click **Next** to save and continue.
13. **Issued For Contact** – Select the person from the dropdown (or enter a new person in the fields below) to indicate who the contact person at the Issued For Agency should be. Click **Next** to save and continue.
14. **Document Information** - Populate fields listed below. (Required fields are indicated with an asterisk.)
    a. **Agreement Start Date** – Click the calendar icon to the right of the empty field to select a start date.
    b. **Expiration Date** – Click the calendar icon to the left of the empty field to select an expiration date.
    c. **Maximum Agreement Term** – This is an optional field, but if you would like to indicate a maximum agreement term date, click the calendar icon to the left of the empty field to select the date.
    d. **Agreement Value** – Enter your best estimation of the total agreement value in whole numbers. You may enter 0 if there are no dollars to be exchanged.
    e. **Currency and Rate** – These fields auto-populate and should be left as is.
    f. **Document Title** – Enter a title for the agreement.
    g. **Subject Matter** – Enter a description of what the agreement is for.
    h. **Number of days prior to agreement Expiration to notify Buyer** – Indicate when you would like to receive an agreement expiration notice email. It defaults to 60 days.
    i. **Maximum # of Items to display in Item Block** – Leave this field blank.
    j. Click **Next** to save and continue.
15. **More Information** - Populate fields listed below. (Required fields are indicated with an asterisk.)
    a. **Delivery Requirements** – Enter delivery requirements here. If there are none, type “N/A”.
    b. **FOB** – Select the appropriate Freight on Board description.
    c. **Delivery Comments** – Enter as appropriate.
    d. **Payment Terms** – This defaults to Net 45, but you may change this if desired.
    e. **Payment Terms Comments** – Provide additional payment term details if needed.

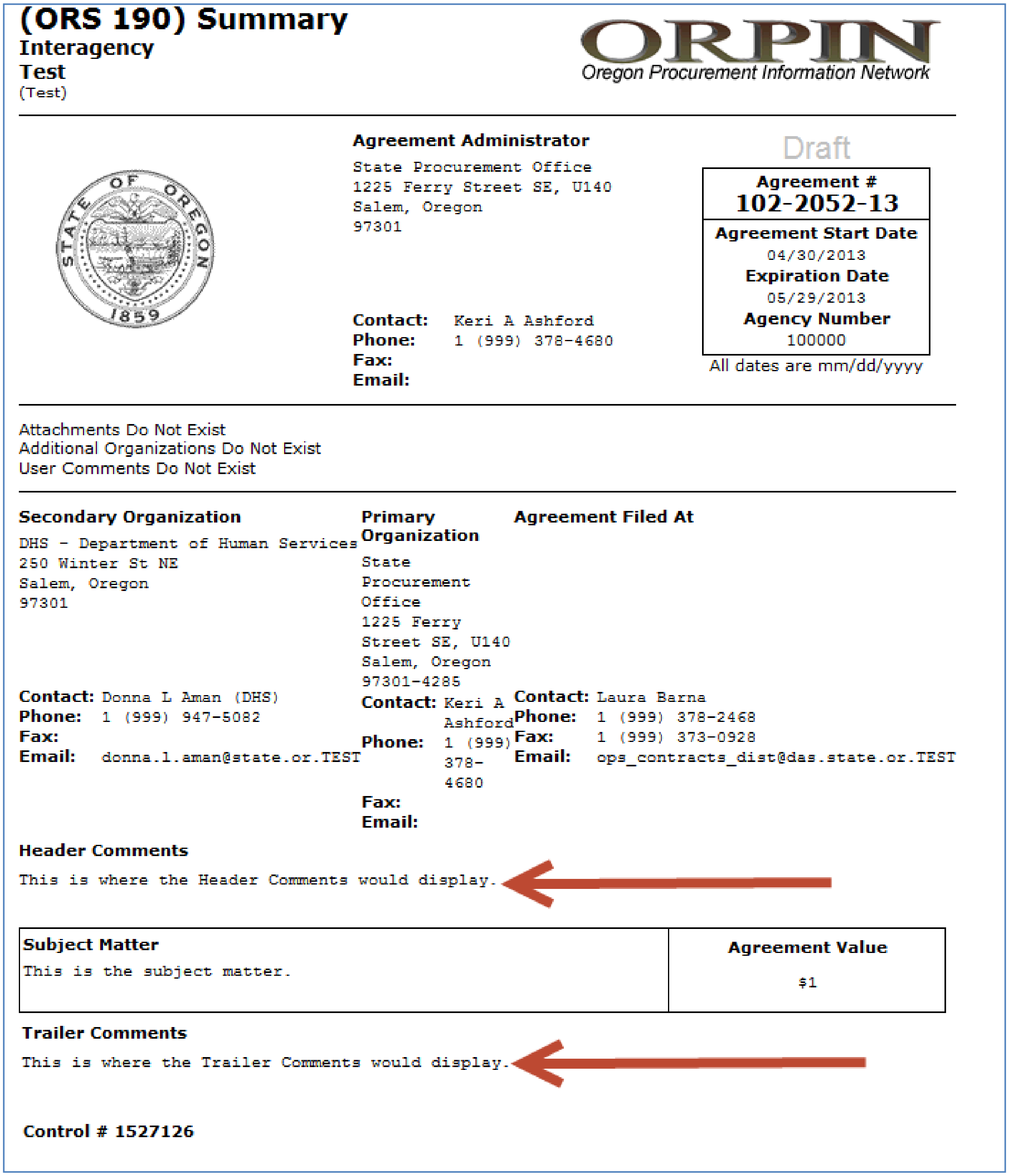
f. **Procurement Authority Citation** – Indicate where your procurement authority for this agreement comes from.
g. **Procurement Authority Citation Comment** – Cite the actual rule, etc which gives you your agreement authority.



h. **Special Procurement/Exemption** – If this agreement was the result of a special procurement or exemption, please indicate this by choosing from the dropdown.
i. **Special Procurement/Exemption Citation** – If this agreement was the result of a special procurement or exemption, please cite the procurement or exemption number here.
j. **Agreement Filed At** – How you populate this field is extremely important. It controls which agency will be able to make changes to the documents within the master file going forward. Please indicate whether DAS SPO or the Agency will maintain control of the procurement file going forward.
k. **Assigned Mentor** – If you worked with a mentor during this procurement and would like to note this, enter the mentor's name here.
l. **DOJ Assigned Attorney** – If you would like to track which DOJ attorney you worked with on this procurement, list it here.
m. Click **Next** to save and continue.

16. **Financial Data** – This is an optional area where you could track accounting numbers if desired. Click **Next** to save and continue.
17. **Attachments** – Load any attachments that you would like to post on the agreement file by entering an Attachment Title and then clicking the Browse button to locate the file on your computer. For example, you may choose to upload a copy of the actual signed agreement document (just remember all suppliers and internal agency users can view agreement attachments), specific ordering instructions, etc. **Next** to save and continue.
18. **Organization Attachments** – If this page displays, you do not need to load anything on this page. By default, it contains the State of Oregon seal, which will display on the ORS190 Summary page. Click **Next** to save and continue.

19. **Header Comments** – Enter language that should show up in the header section of the ORS190 Summary contract document in ORPIN. Click **Next** to save and continue.



(ORS 190) Summary
Interagency
Test
(Test)

ORPIN
Oregon Procurement Information Network

Agreement Administrator
State Procurement Office
1225 Ferry Street SE, U140
Salem, Oregon
97301

Contact: Keri A Ashford
Phone: 1 (999) 378-4680
Fax:
Email:

Draft

Agreement #
102-2052-13
Agreement Start Date
04/30/2013
Expiration Date
05/29/2013
Agency Number
100000

All dates are mm/dd/yyyy

Attachments Do Not Exist
Additional Organizations Do Not Exist
User Comments Do Not Exist

Secondary Organization
DHS - Department of Human Services
250 Winter St NE
Salem, Oregon
97301

Contact: Donna L Aman (DHS)
Phone: 1 (999) 947-5082
Fax:
Email: donna.l.aman@state.or.TEST

Primary Organization
State Procurement Office
1225 Ferry Street SE, U140
Salem, Oregon
97301-4285

Contact: Keri A Ashford
Phone: 1 (999) 378-4680
Fax:
Email:

Agreement Filed At

Contact: Laura Barna
Phone: 1 (999) 378-2468
Fax: 1 (999) 373-0928
Email: ops_contracts_dist@das.state.or.TEST

Header Comments
This is where the Header Comments would display.

Subject Matter	**Agreement Value**
This is the subject matter.	$1

Trailer Comments
This is where the Trailer Comments would display.

Control # 1527126

20. **Trailer Comments -** Enter language that should show up in the Trailer Comments section of the agreement document in ORPIN. (See screenshot on previous page.) Click **Next** to save and continue.

21. In order for you to publish your agreement, you must process it through the workflow.
    a. Begin by clicking **Complete Step (Creation)** in the menu bar.
        i. If your opportunity is missing any required information, you will receive an "Integrity Check Failed" message outlining what is missing.
        ii. Click on the underlined location and fill in the missing information.
        iii. Once all of the information is populated, you can click on **Complete Step (Creation)** again.
    b. The next step in the workflow will display. Click the dropdown box and choose the name of the person who will process the next step. If you plan on completing the workflow yourself, choose your own name in the dropdown.
    c. Continue clicking on the **Complete Step** button until you have issued the document or assigned it to someone else to complete.