BidBuy
ILLINOIS ePROCUREMENT

State of Illinois
General Navigation Manual
17 V1

Periscope
HOLDINGS INC

Table of Contents

BidBuy General Overview 4
Overview & Outcomes 6
Basic Purchasing User (Internal) 6
Department Access User (Internal) 6
Understand Home Page Navigation 8
Role Tabs 8
Header Menu 9
Header Menu: NIGP Code Browse 9
Header Menu: My Account 10
Header: Customer Service 17
Header: About Tab 18
Header Menu: Current Organization 18
Header Menu: System Date & Time 19
Header Menu: Advanced Search 20
Header Menu: Advanced Search: Bids 21
Header Menu: Advanced Search: Commodity Codes 22
Header Menu: Advanced Search: Contract/Blankets 23
Header Menu: Advanced Search: Items 23
Header Menu: Advanced Search: Purchase Orders 24
Header Menu: Advanced Search: Quotes 25
Header Menu: Advanced Search: Requisitions 26
Header Menu: Advanced Search: Vendors 26
Header Menu: Help 27
Header Menu: Log Out 28
Navigation Menu 28
Navigation Menu: Home 28
Navigation Menu: Items 29
Navigation Menu: Documents 29
Navigation Menu: Quick Buy 35
Control Center 36
Control Center: News 36

Control Center: Dashboard 37
Control Center: Reqs 38
Control Center: Bids 40
Control Center: PO 43
Control Center: Approval 45
Control Center: Receiving (Not used by the State) 46
Control Center: Reminders 46
Control Center: System Messages 47
Appendix A: Unit of Measure Descriptions 51
Appendix B: Forms By Process 52
Appendix C: Custom Columns 56

The information contained in this document is a general guideline for the processing of procurements using the State of Illinois BidBuy system. State of Illinois procurements must be conducted in accordance with applicable statutes and rules, including the Illinois Procurement Code. For any questions, please contact your Agency Procurement Officer (APO) or State Procurement Officer (SPO).

Note: If not an AIS Agency, some fields in the screen shots may not be available to you.

BidBuy General Overview

General Overview

User Roles

Department Access (DA)*

Department Access is the role for Agency requestors or end-users. Department Access gives users the ability to be a requisitioner or contract shopper.

A requisitioner is a user who creates Requisitions from scratch, while a contract shopper is able to order from existing blanket contracts only.

Basic Purchaser (BP)*

Basic Purchaser (BP) is the role for Agency purchasing staffs and APOs.

Basic Purchasers can create all documents on the Agency side such as Requisitions, Bid, Purchase Orders and their related documents such as Amendments, Change Orders and revisions.

* An approver may be configured as either a Department Access or Basic Purchaser. In addition, if a user's role is to approve only, they may be setup as a Department Access role with approval rights only, disallowing both requisitioning or contract shopping.

General Document Structure

	Requisition Types: Open Market, Release & Demand	Bid New Public Procurement Bulletin	Purchase Order Types: Purchase Order & Master Blanket
Document Numbering	17-416CMS-BOSS4-R-101	17-416CMS-BOSS4-B-87	17-416CMS-BOSS4-P-200
	Fiscal Year - Organization ID - Department ID - Document Letter - Record Number*		
Document Description	Requisitions are documents that Agencies use to request goods or services. In addition to Agency approvals, CMS Bureau of Strategic Sourcing and the Governor's Office of Management and Budget will provide approval on the Requisition.	A Bid allows you to publish a request for goods and services in BidBuy, and have registered vendors login, view and ultimately quote on those bids. BidBuy can help you to choose the best quote, award the Bid (Bid Tab**) and convert the Bid to a Purchase Order/Contract.	Purchase Orders are used to purchase goods or services. In addition, they communicate details about the purchase both to the public, vendor(s) and the State that need to know about the purchase (i.e. accounting, requestor). Contract amendments may be applied to Purchase Orders via Change Orders.
Legacy System	Procurement Business Case (Remedy), IGPS, Surveys, Procurement File	Illinois Procurement Bulletin for General Services, Procurement File	IGPS, Procurement File

*Record Numbers are generated based on a number wheel exclusive to each of the 3 documents. (i.e. Req, Bid, PO) As a result, a Requisition's record number may be 300, while the associated Purchase Order is 102.

** The Bid Tab is a sub-document of the Bid where Vendor Quotes are tabulated, and where an award is recorded.

Remember! Use the symbol to quickly and easily search for any document available to you.

Terms Crosswalk

Current	Future
Solicitation/Notice	Bid
IPB Registered User	Bidders
Addendum	Amendment
Bid/Offer/Response	Quote
Award Information	Bid Tab
Contract	Purchase Order (PO)
Amendment	Change Order

General Process Workflows

Included below is a high level walkthrough of the most common BidBuy process workflows.
- Each process step affords the opportunity for approvals to occur based on identified criteria, including Agency department, location, procurement amount, NIGP codes, user role and accounting.

Small Purchase – Begins with an Open Market Requisition, then converted to a Purchase Order.

Requisition → Bid ($10,000 to Formal Solicitation Threshold) → Purchase Order

Competitive Solicitation – Begins with an Open Market Requisition, which is converted to a Bid for public solicitation. Once quotes are obtained, the Bid Tab is opened and vendor is awarded. The Bid Tab is then converted to a Purchase Order.

Requisition → Bid → Bid Tab → Purchase Order

Release (Order Against Contract) – Begins with a Release Requisition, then converted to a Purchase Order.

Release Requisition → Purchase Order

Renewal – Begins with an Open Market Requisition referring to the associated Purchase Order/Contact. The Requisition is converted to a Bid and the Bid Tab is completed with the renewal amount(s). Finally, a Change Order is created against the original Purchase Order/Contract for the Renewal terms.

Requisition → Bid → Bid Tab → PO Change Order

Change Order – Begins with an Open Market Requisition referring to the associated Purchase Order/Contact. The Requisition is converted to a Bid and the Bid Tab is completed with the change order amount(s). Finally, a Change Order is created against the original Purchase Order/Contract based on the Change Order terms.

Requisition → Bid → Bid Tab → PO Change Order

Overview & Outcomes

This document is a reference guide to BP and DA users to enable the users to navigate the BidBuy application. For the purposes of this document, the primary focus will show the BP user access, but will note the differences in BP and DA access when applicable. For additional detail for each role, see the online help, or question mark icon, for role specific help.

Basic Purchasing User (Internal)

The Basic Purchasing User can create and process different types of requisition documents (open market, release, and demand), create and process formal and informal bid documents and create and process different types of purchase order and change order documents as listed below:

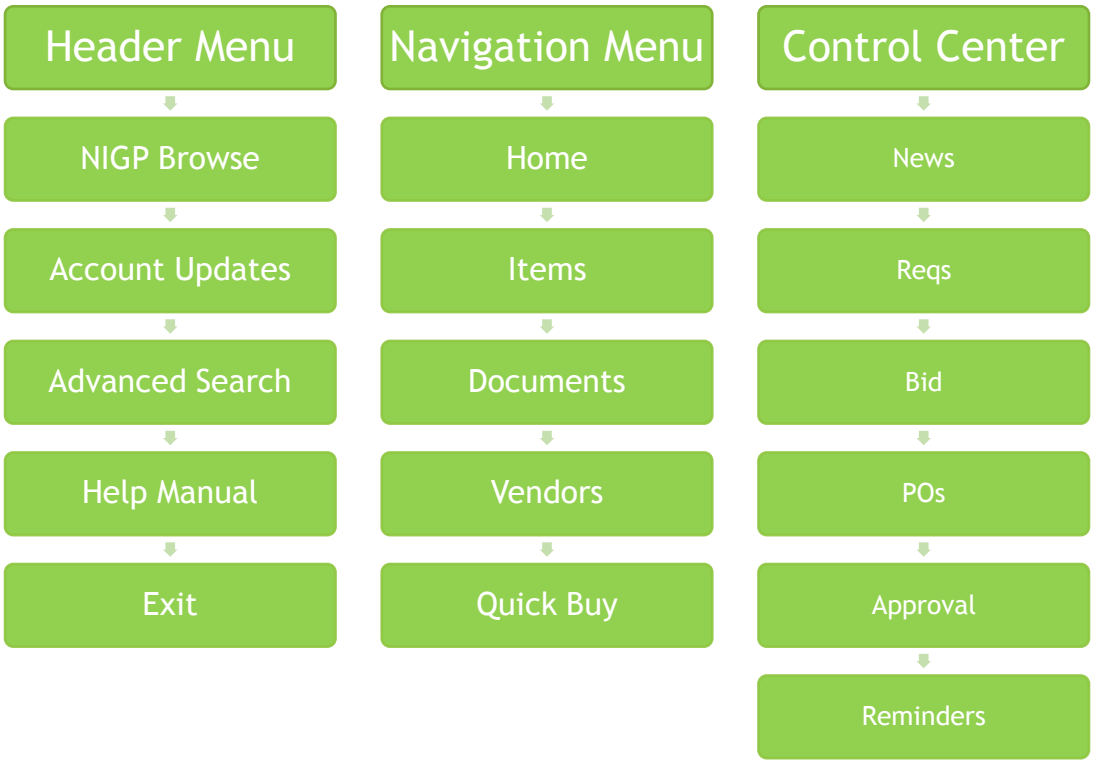
- **Release Requisition –** Release off Master Blanket
- **Open Market Requisition –** RFP, IFB, Create Blanket Contract, formal solicitation and small purchase
- **Demand Requisition –** Survey
- **Open Market Bid (formal) -** RFP, IFB, Create Blanket Contract
- **Informal Quote –** Small Purchase (from Open Market Requisition)
- **Blanket Purchase Order –** term contract agreement
- **Open Market Purchase Order -** RFP, IFB, Create Blanket Contract, small purchase
- **Assign Approvers**
- **Approve documents**

Department Access User (Internal)

The Department Access User can create and process requisition documents (open market and release), approve documents, initiate change orders as listed below:

- **Release Requisition –** Release off Master Blanket
- **Open Market Requisition –** RFP, IFB, Create Blanket Contract, formal solicitation and small purchase
- **Informal Quote –** Small Purchase (from Open Market Requisition)
- **Approve documents**

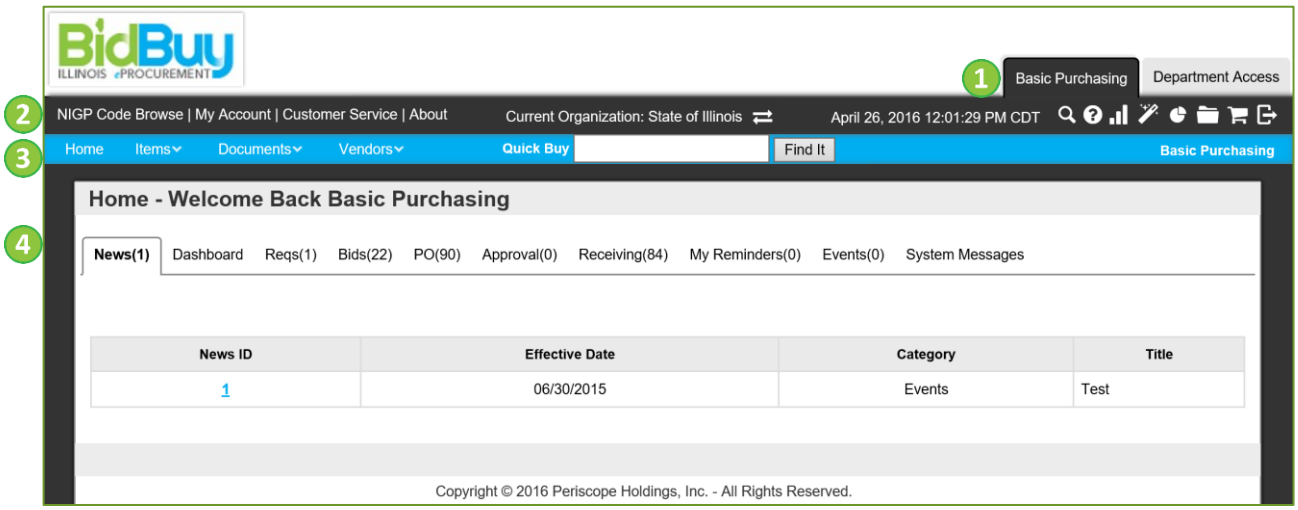
Home Page


Header Menu
NIGP Browse
Account Updates
Advanced Search
Help Manual
Exit
Navigation Menu
Home
Items
Documents
Vendors
Quick Buy
Control Center
News
Reqs
Bid
POs
Approval
Reminders

Understand Home Page Navigation

Under the **Basic Purchasing or Department Access** tab, the home page is divided into four areas:

1. **Role Tabs** – User role controls access in the system. Tabs will only appear if the user has more than one role assigned.
2. **Header Menu** – NIGP browse, account setup, search, help manual, and exit
3. **Navigation Menu** – navigate to Home Page, Items search, Documents, Vendors and Quick Buy
4. **Control Center** – fluid navigation of News, Reqs, Bids, POs, Approvals and Reminders

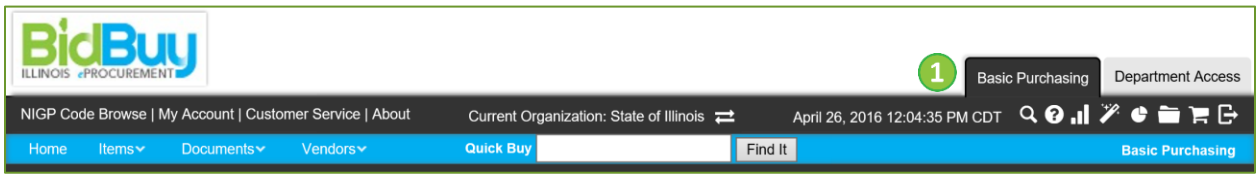


Role Tabs, Header Menu and **General Navigation Menu** are consistent for each screen. **Control Center** is a summary of BidBuy activity and is fluid depending on updates that are dynamically created by each section.

Role Tabs

If the user has multiple roles within BidBuy (for example you are a Basic Purchasing User as well as a Department Access User for the State), the user sees tabs as indicated below. Each role within the application has its own control center. For more information on the control center, see the Control Center section.

1. Click **Basic Purchasing** tab

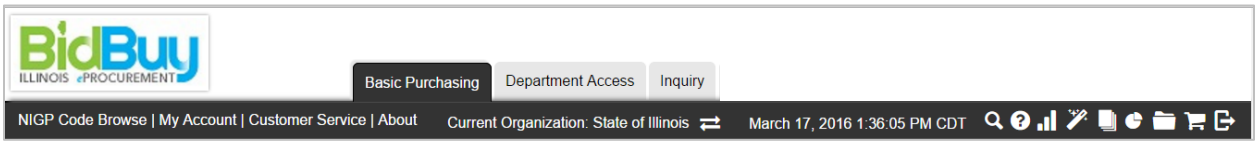


If the User has one role, then the role tab does not appear.

Header Menu

The **Header Menu** is static and always displayed at the top of each page. This menu allows the user to access:

- NIGP Code Browse
- My Account
- Customer Service
- About
- Current Organization
- BidBuy Date Time
- Advanced Search (for the user's organization)
- Help Manual (role specific)
- Reporting Dashboard (access dependent on State configuration)
- Ad Hoc Reporting (access dependent on State configuration)
- Form Builder (access dependent on State configuration)
- Administrative Reports (access dependent on State configuration)
- Document Dashboard – not used by State
- G2B shopping cart – not used by State



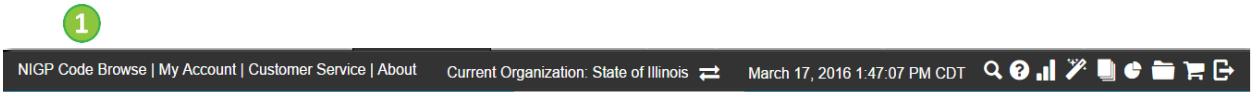
- System Exit

Header Menu: NIGP Code Browse

The NIGP Code Browse link bar allows a search of commodity codes by Class and Class Item codes set up and maintained in the BidBuy database.

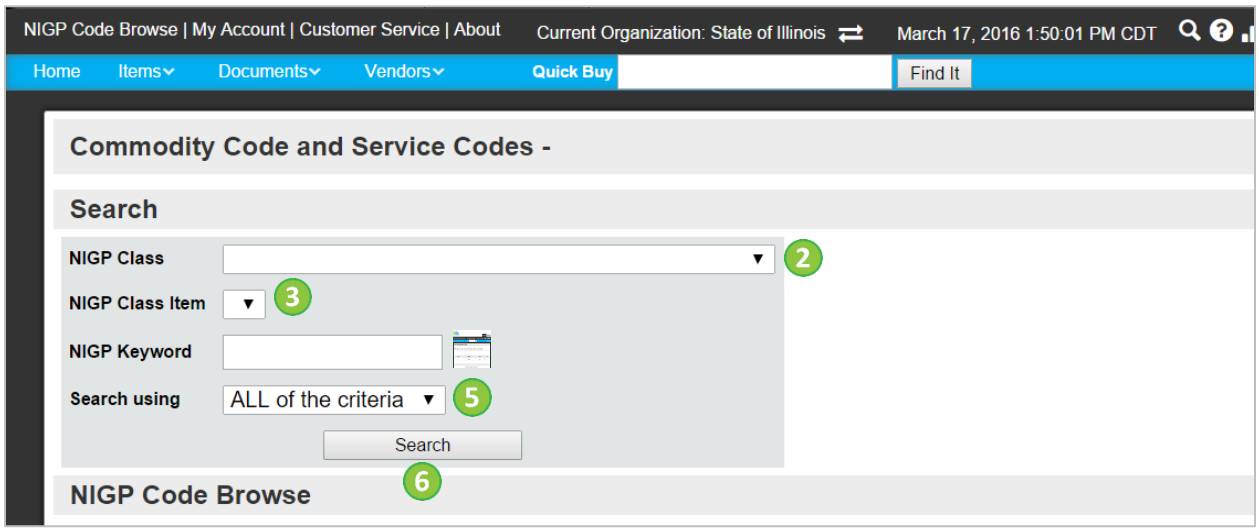
The NIGP Commodity/Services Code is an acronym for the National Institute of Governmental Purchasing Commodity/Services Code. The NIGP Code is a coding taxonomy used primarily to classify products and services procured by state and local governments in North America. It is used by the State of Illinois to classify goods and services during procurement.

1. Click **NIGP Code Browse** on Header Menu



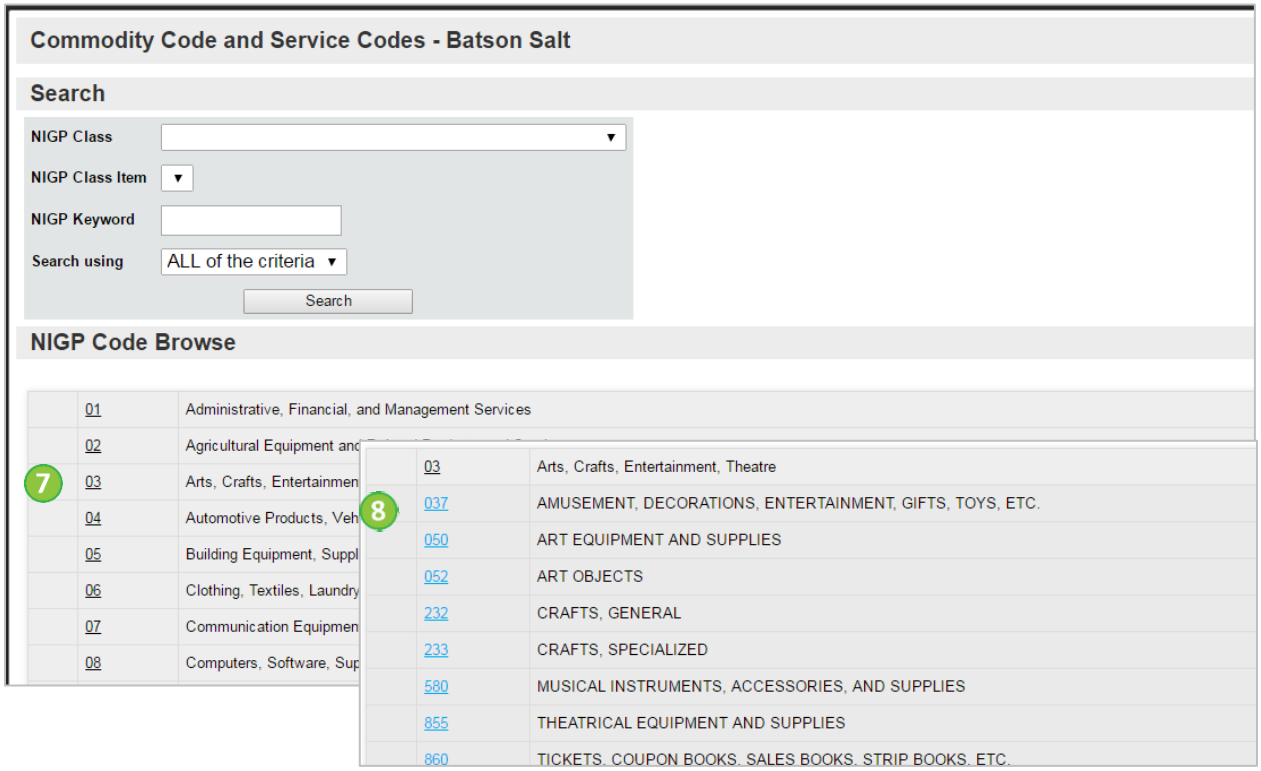
2. Select **NIGP Class** code from pulldown menu
3. Select **NIGP Class Item** from
4. Enter **NIGP Keyword** to search for a certain code
5. Select search type criteria by Search using drop-down

6. Click **Search** to execute search



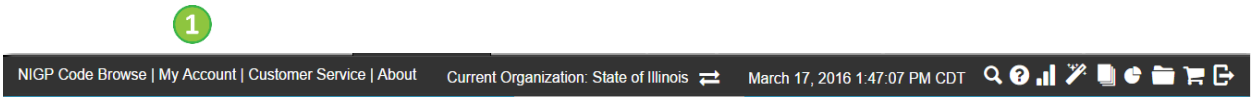
7. To browse all **NIGP Class** codes, scroll-down to **NIGP Code Browse**
8. Click **NIGP Class code** to view NIGP Class Item

The State uses NIGP Class codes and NIGP Class Items – 5 digit NIGP codes.

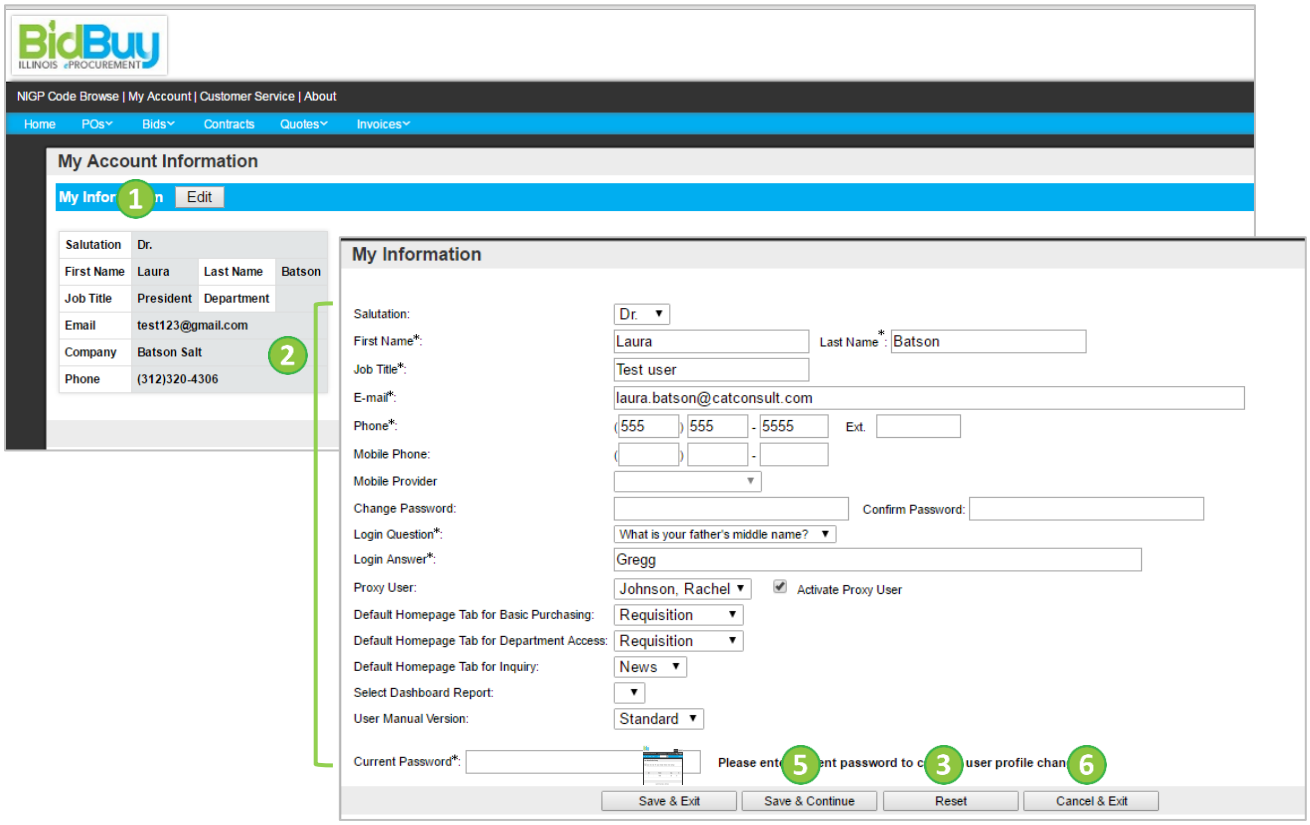


Header Menu: My Account

My Account allows the user to update their user profile.



1. Click **My Account** on **Header Menu**
1. Click **Edit** to change user profile information
2. Update information
3. Click **Reset** to clear all fields
4. Click **Save and Exit** to leave the page
5. Click **Save & Continue** to save and add more information



6. Click **Cancel & Exit** to remove updates and leave the page

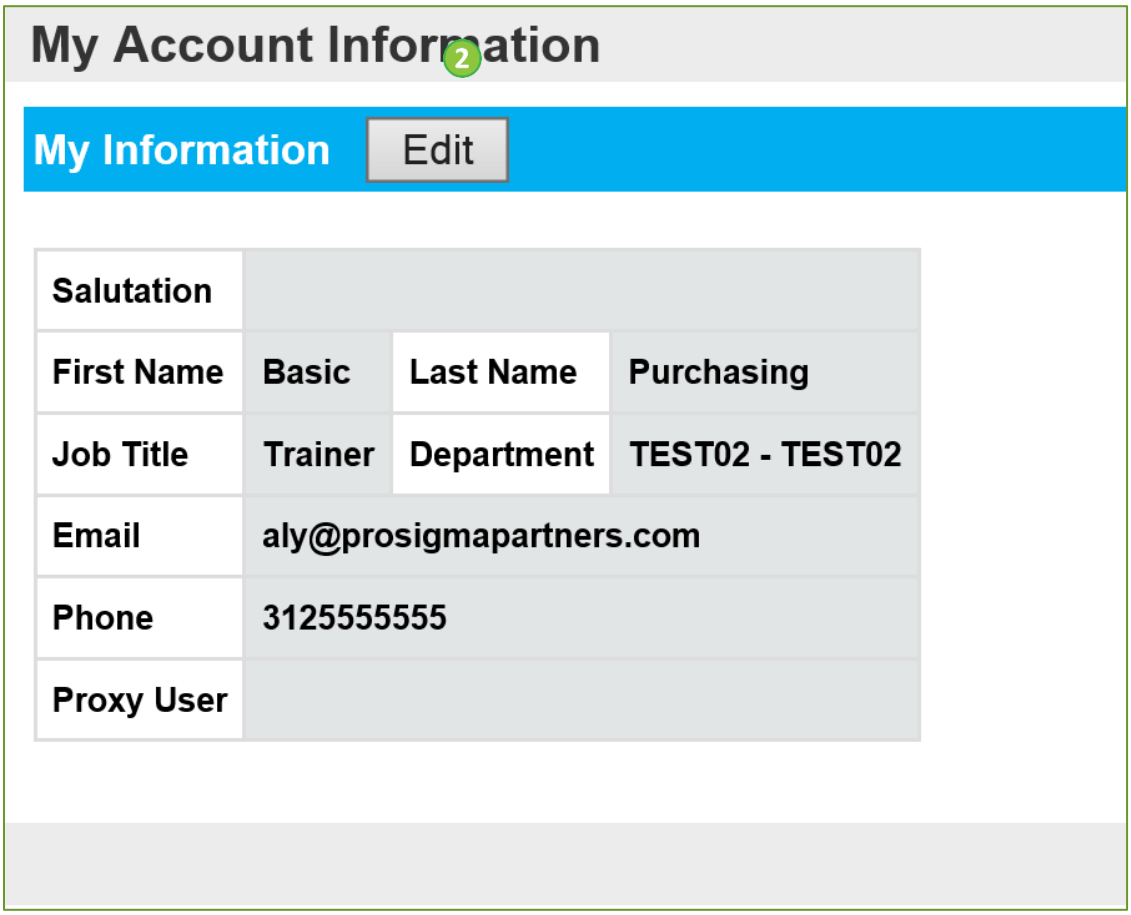
Password Reuse

When a user attempts to change their password with a previously used password, the BidBuy Password Reuse Prevention feature will check the number of resets allowed prior to permitting reuse.

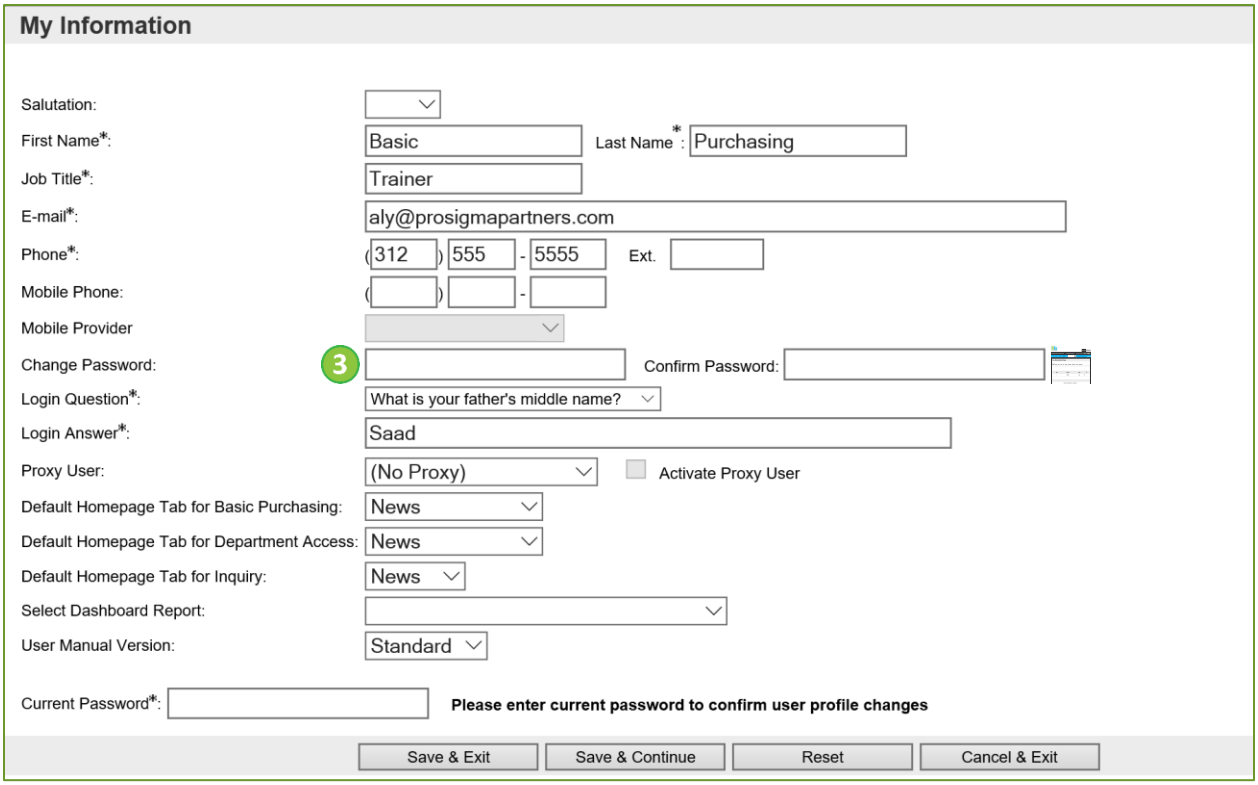
The State of Illinois requires users not be able to reuse the past 12 passwords.

1. Click on **My Account** to edit Password or other account information.

2. Click **Edit** and BidBuy will direct the user to **My Information** page



3. Re-enter new password in **Confirm Password**

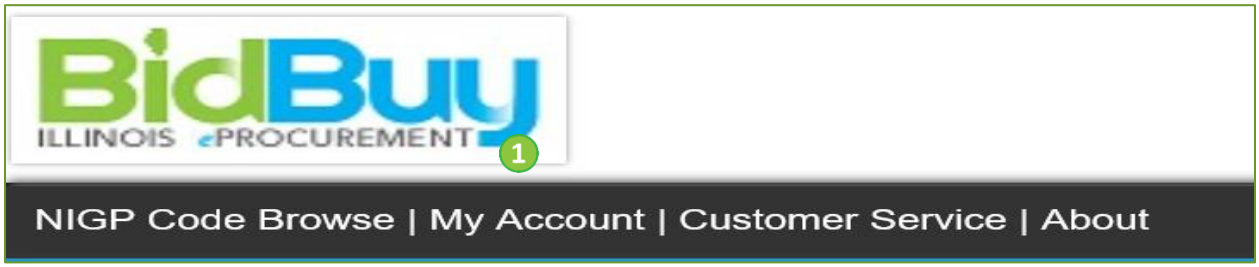


System will display Error if the password was previously used.

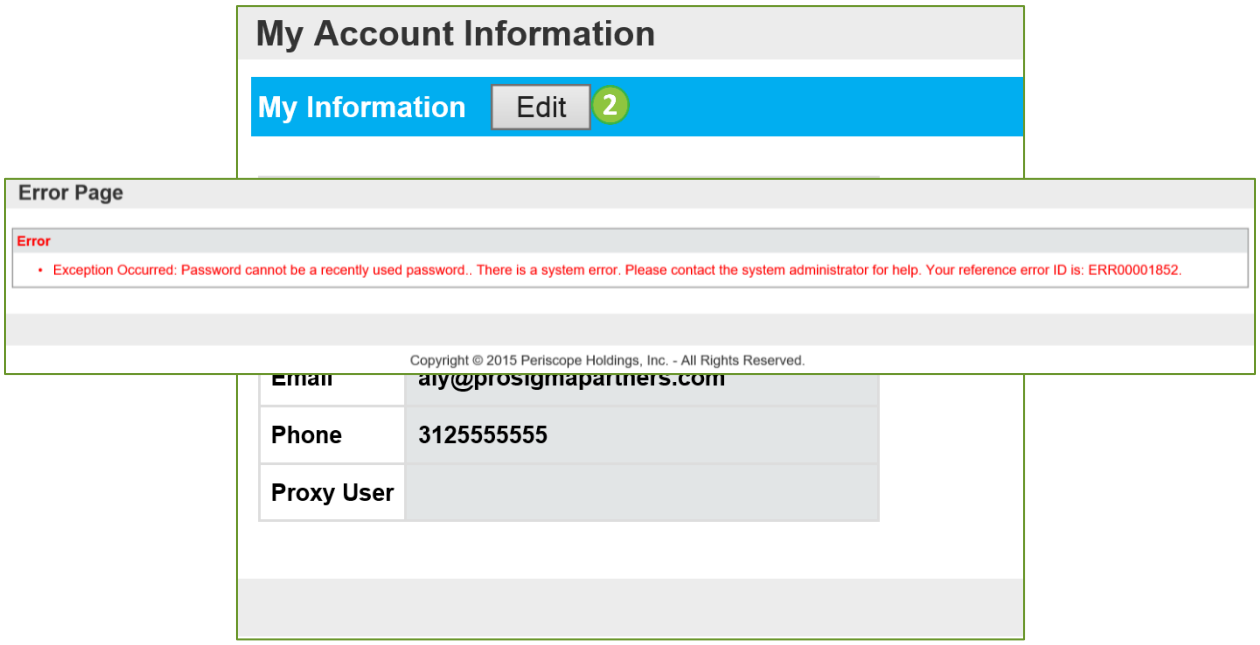
Set/Clear Proxy User

Use the Proxy User dropdown menu to designate a BidBuy user access to approve documents on your behalf in BidBuy. The Proxy is required to have rights to approve documents in BidBuy. When 'Activate Proxy User' is checked, the proxy will see documents ready for your approval available in their Approvals tab and receive emails when new approvals are submitted to you.

1. Click on **My Account** to designate a Proxy User

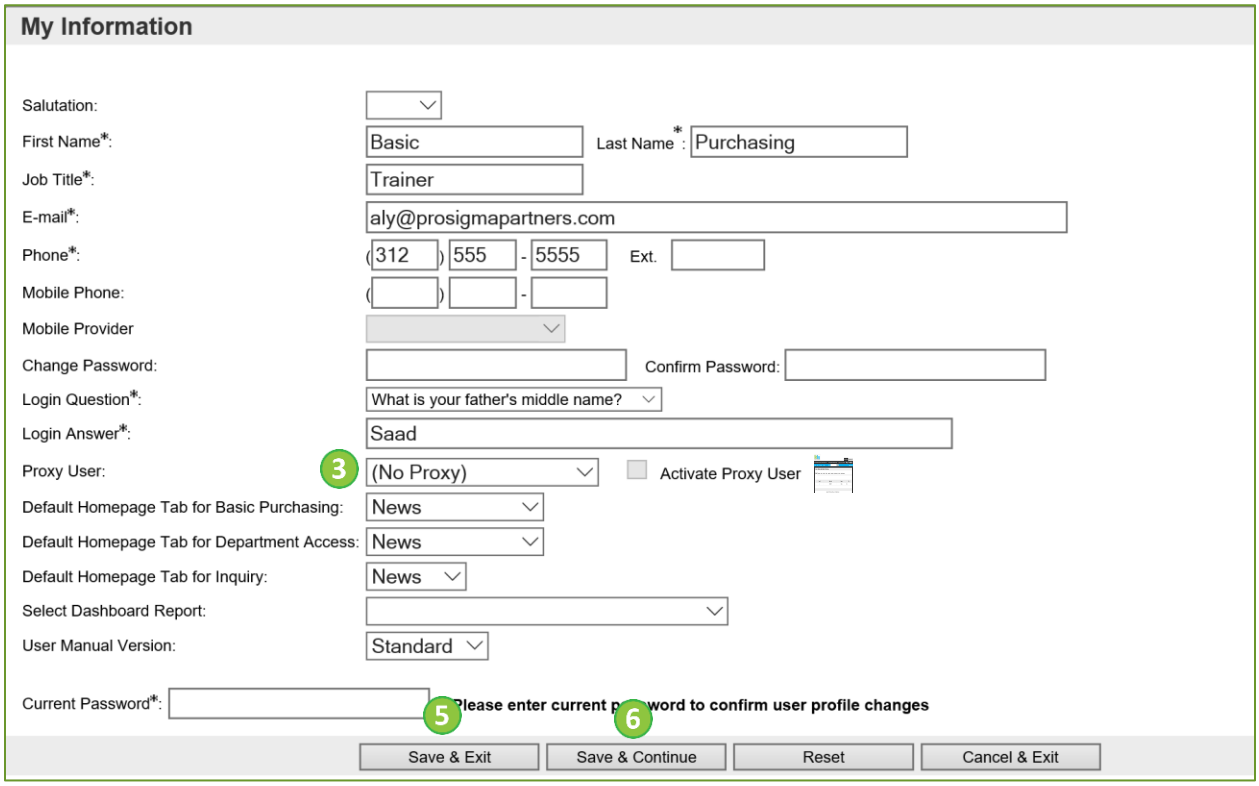


2. Click **Edit** system will direct user to **My Information** page

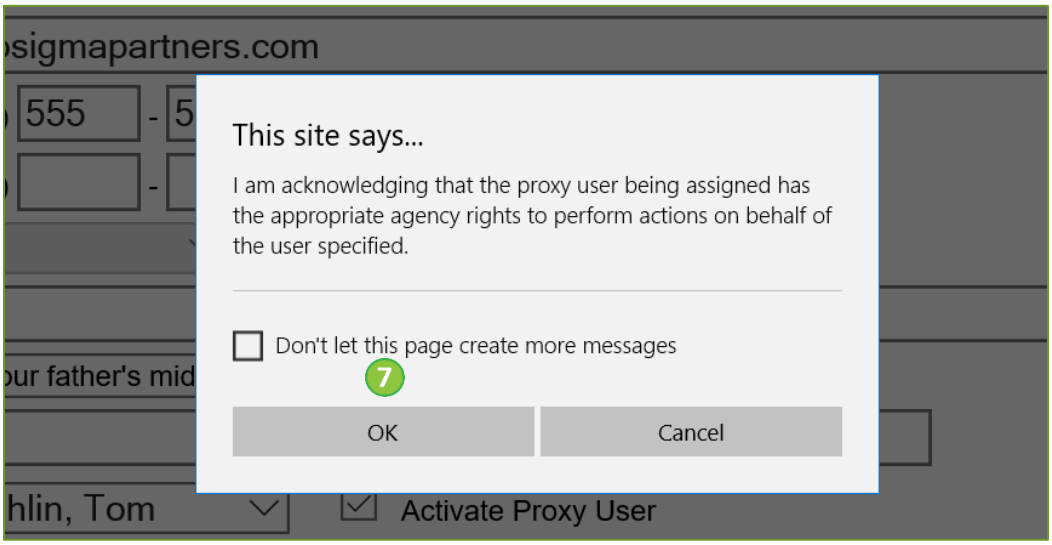


3. Select a proxy user from drop down **Proxy User**
4. Select **Activate Proxy User**
5. Click **Save & Exit** to save and exit

6. Click **Save & Continue** to save and continue

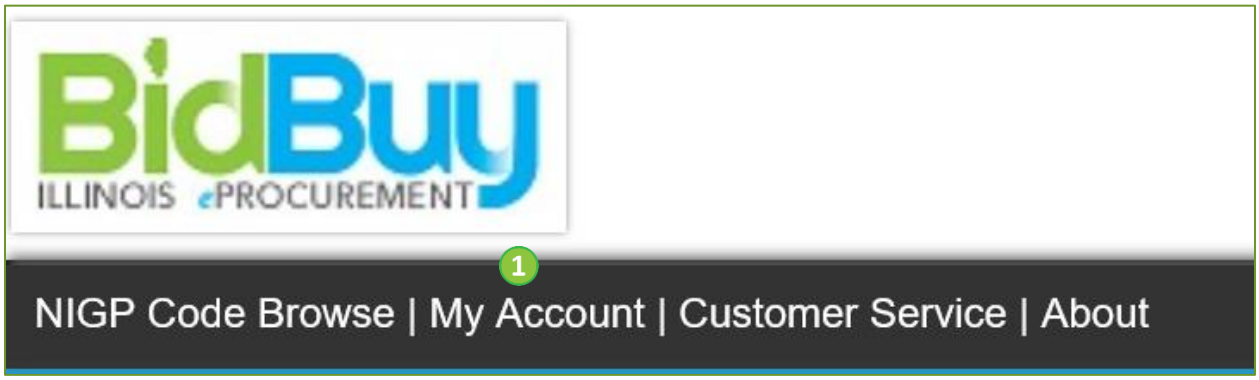


7. Click **OK** on pop up to confirm change



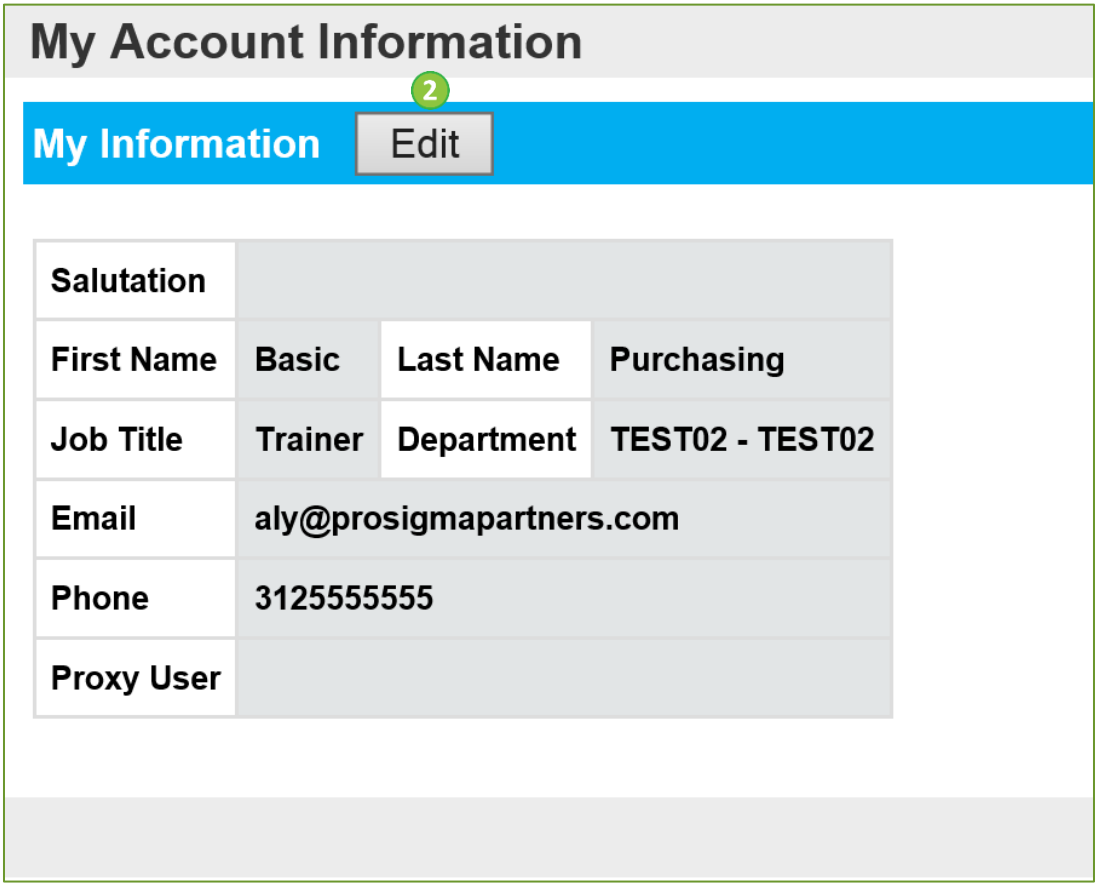
Set Default Homepage Tab

The Basic Purchasing or Department Access User may select a tab to start on when logging into the user's home page. Use the dropdown menu to designate the preferred document type to default to



upon viewing the home page. Click **My Account** to edit user Password

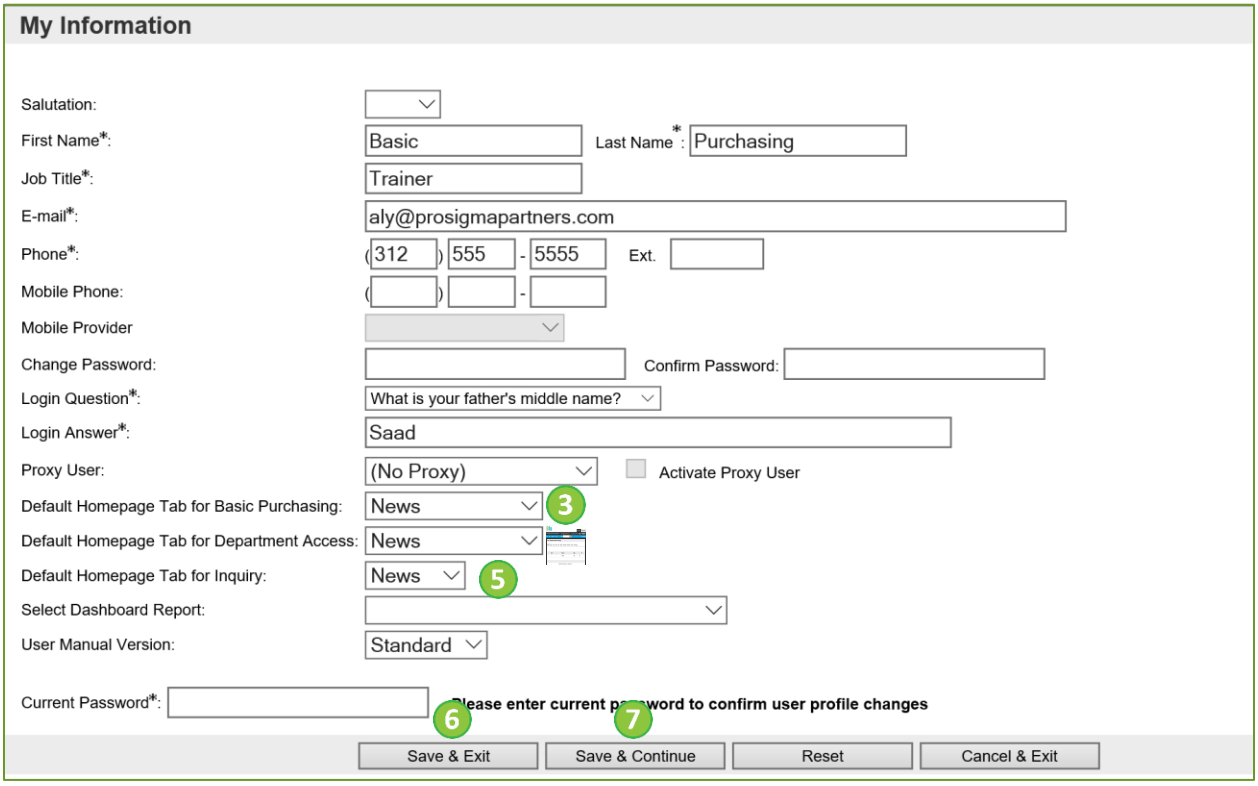
1. Click **Edit** and the system will direct the user to **My Information** page



2. Select **Default Homepage Tab** for **Basic Purchasing** role from drop down
3. Select **Default Homepage Tab** for **Department Access** role from drop down
4. Select **Default Homepage Tab** for **Inquiry** role from drop down

> **The Default Homepage is only available for the Roles the user has in BidBuy. Example, if the user is only a BP user, they will only see the option for "Default Homepage Tab for Basic Purchasing.**

5. Click **Save & Exit** to save and exit
6. Click **Save & Continue** to save and continue



Header: Customer Service

The customer service screen allows the user to contact local BidBuy Support for additional information

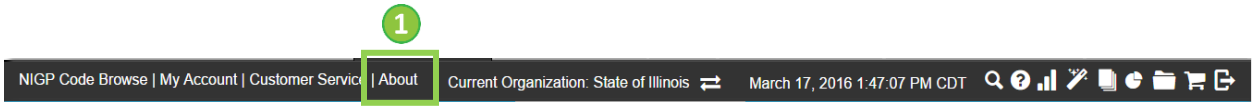
> Help will be configured to send an email to il.bidbuy@illinois.gov.

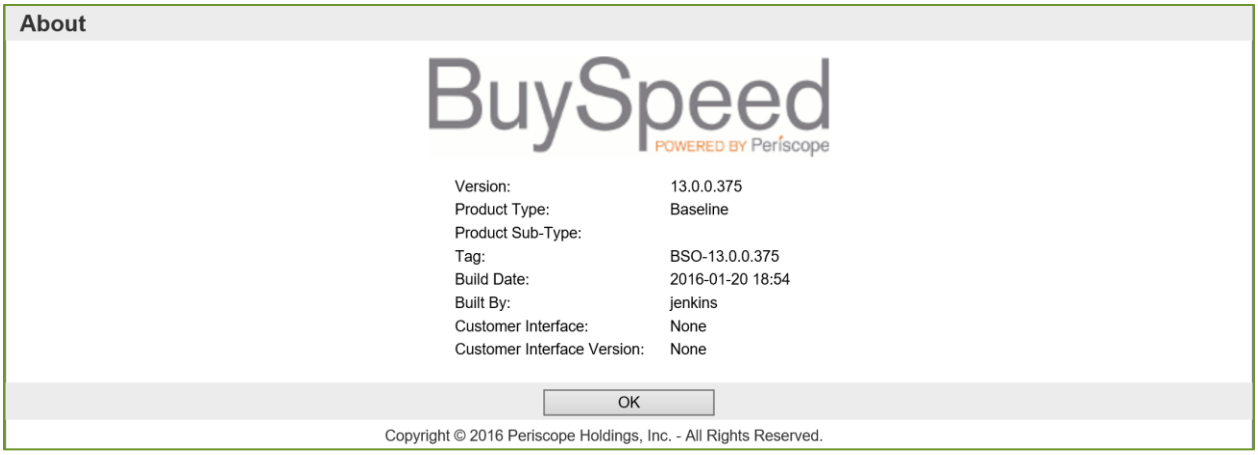
or for assistance with some of the items that are found in the BidBuy application.

Header: About Tab

The screen shows the current version of BidBuy.

1. Click **About**





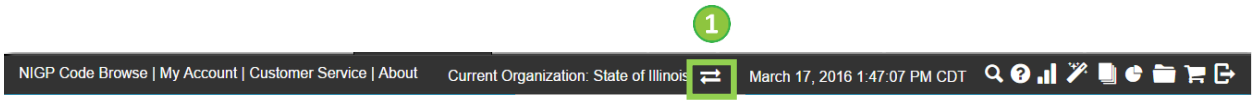
2. Click **OK** to exit

Header Menu: Current Organization

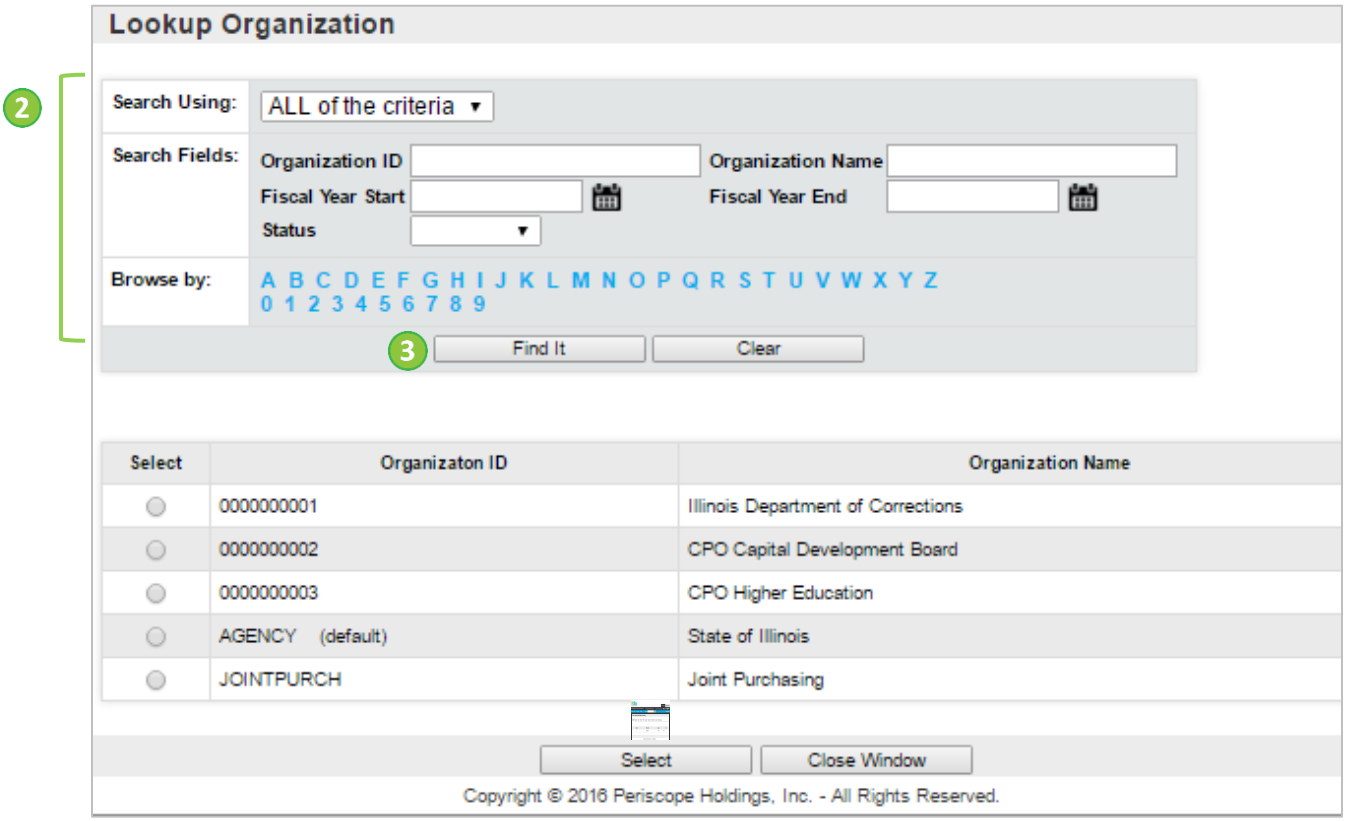
For the State of Illinois, each organization corresponds to a State Agency. For users who have access to multiple organizations, the Current Organization will display the organization that the user is currently logged into. Access to other organizations may be granted by administrators to either BP or DA Users.

If the user has access to multiple organizations, they can change the current organization by clicking on the lookup icon.

1. Click **cross-arrows**



2. To search for an Organization, enter **search criteria**
3. Click **Find It**
4. **Select** button next to organization



5. Click **Select**

Header Menu: System Date & Time

The official system date & time is very important when posting a bid to BidBuy. This clock is synchronized with the official Bid Available date/time and the Bid Opening date/time selected on the Bid by the BP User. If a Bid is not received by the State prior to the official Bid Opening date/time, it is not available for consideration by the State.

Icons in the Header bar

The table below describes the features available using the specific icons.

Icon	Description
	Advanced Search – Search Bids, Commodity Codes, Purchase Orders, Vendors, Contracts, Requisitions, Quotes, and Items by multiple criteria.

Icon	Description
	Help – A popup help window which displays the BidBuy **Basic Purchasing Manual** or the **Department Access Manual** depending on the role selected.
	Reporting Dashboard - if available this will allow the user to view standard dashboard from BidBuy. (Access is dependent on State configuration)
	Ad Hoc Reporting – allows the user to generate ad-hoc reports using the built-in business intelligence (BI) engine if available. (Access is dependent on State configuration)
	Form Builder – allows the user to modify and view agency forms used in all documents if available. (Access is dependent on State configuration)
	Administrative Reports – allows the user to view standard reports made available. (Access is dependent on State configuration)
	Document Dashboard (This is not used by the State at this time)
	G2B Punchout (This is not used by the State at this time)
	Logout – logs the user out of BidBuy

Only Icons that the user is granted access to will be displayed.

Header Menu: Advanced Search

Advanced Search allows the user to search in the Purchasing Module for various document types.

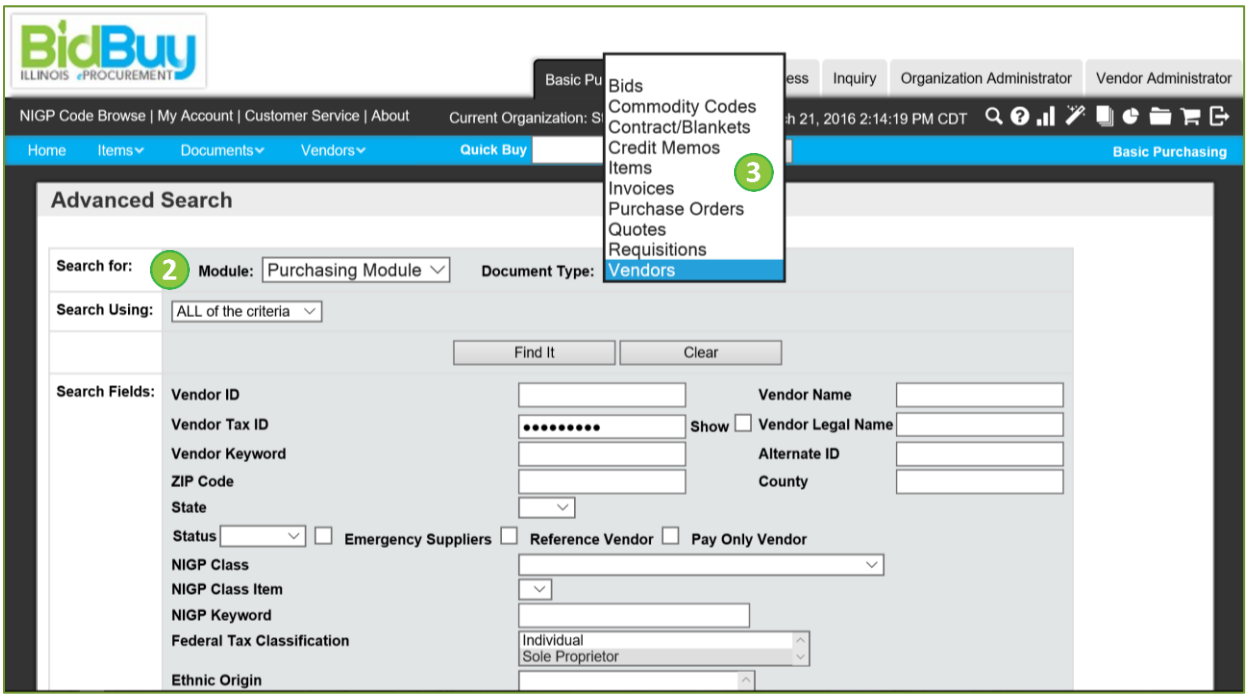
1. Click **Search** Icon
2. Select **Purchasing Module**
3. From drop-down, select **Document Type**

Available document types are:

- **Commodity Codes** – search commodity codes in BidBuy
- **Contract/Blankets** – search blanket / contracts in BidBuy
- **Credit Memos (Not used by State)** – search credit memos in BidBuy
- **Items** – search items in BidBuy
- **Invoices (Not used by the State)** – search invoices in BidBuy
- **Purchase Orders** – search Purchase Orders in BidBuy
- **Quotes** – search quotes in BidBuy
- **Requisitions** – search requisitions in BidBuy

- **Vendor** – search vendors in BidBuy

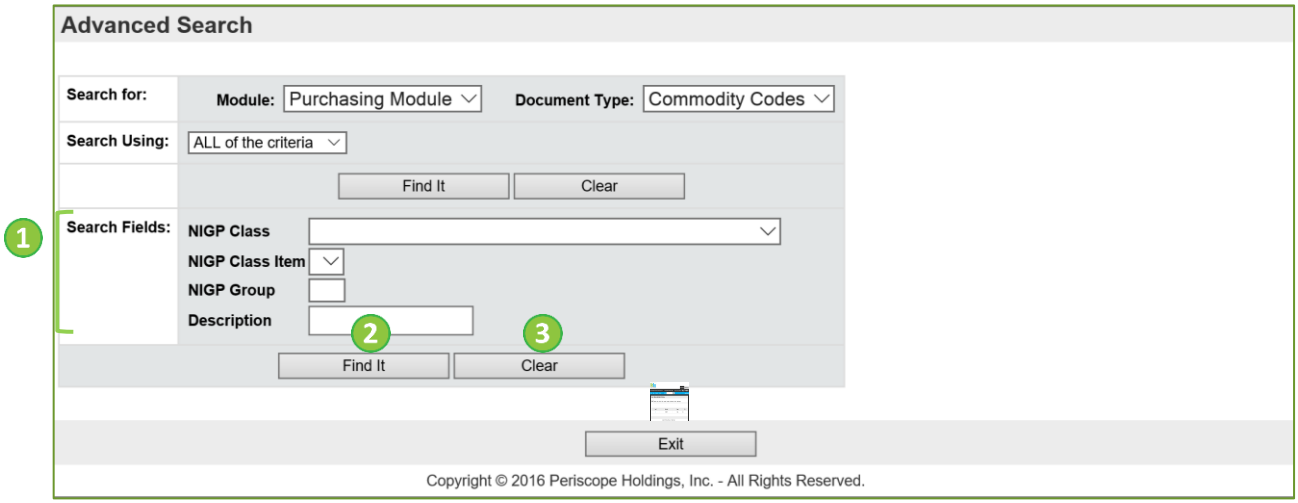
> **The State only uses the Purchasing Module.**



Header Menu: Advanced Search: Bids

The Advanced Search, Bids allows users to search for Bids within the user's access. While there could be many reasons for a user to search for Bids, one example is to locate a Bid when the status is not known.

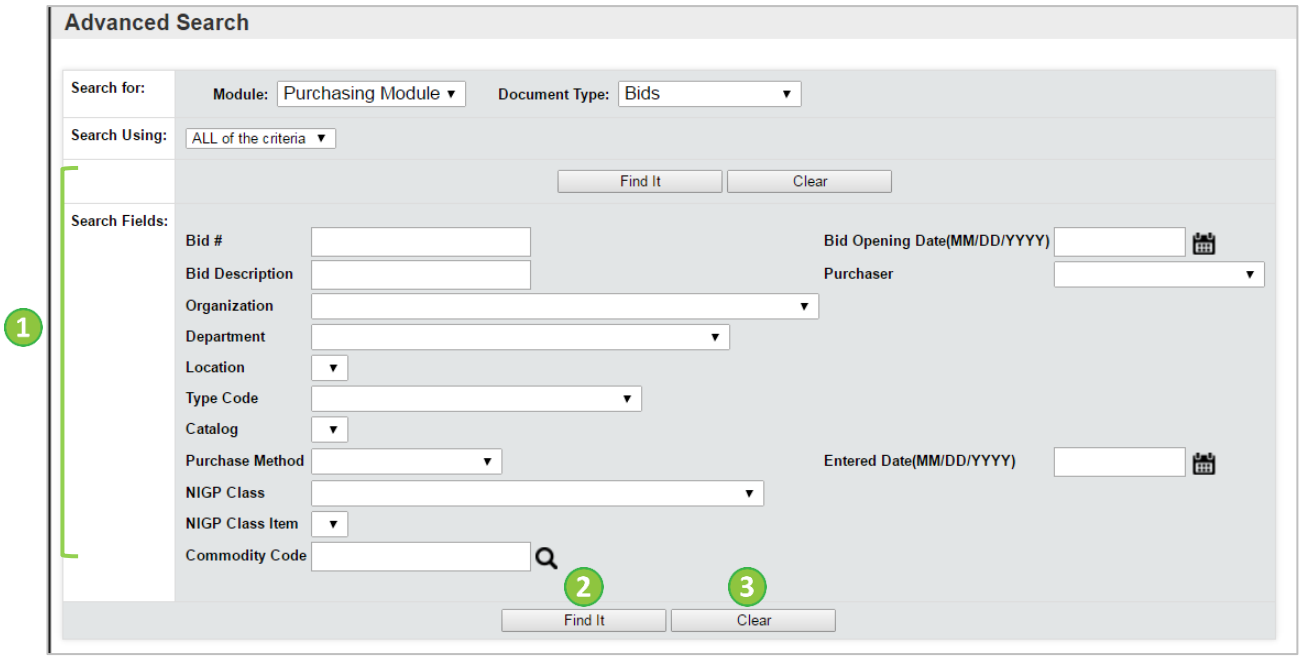
1. Enter **Search Fields**
2. Click **Find It**
3. Click **Clear** to clear the display



Header Menu: Advanced Search: Commodity Codes

The Advanced Search, Commodity Codes allows users to search for NIGP codes.

1. Enter **Search Fields**
2. Click **Find It**
3. Click **Clear** to clear the display

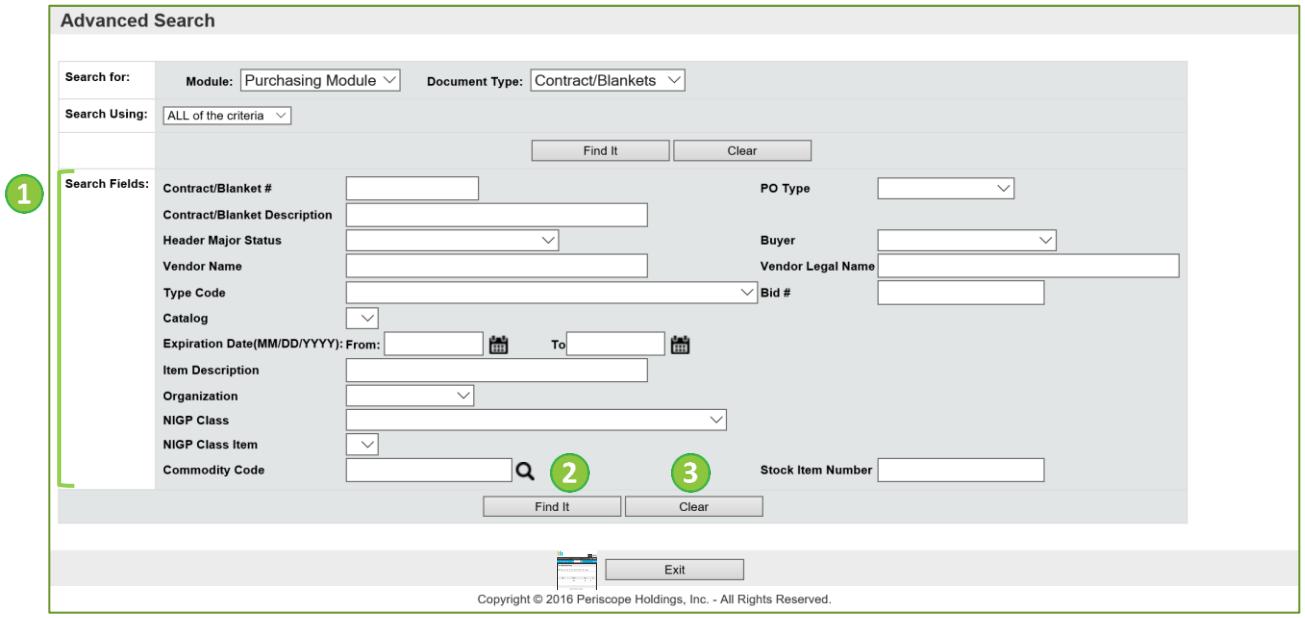


4. Click **Exit** to exit

Header Menu: Advanced Search: Contract/Blankets

The Advanced Search, Contract/Blankets allows users to search for Master Blanket Purchase Orders within the user's access. While there could be many reasons for a user to search for Master Blanket Purchase Orders, one example is to locate a contract if the status is not known.

1. Enter **Search Fields**
2. Click **Find It**
3. Click **Clear** to clear the display

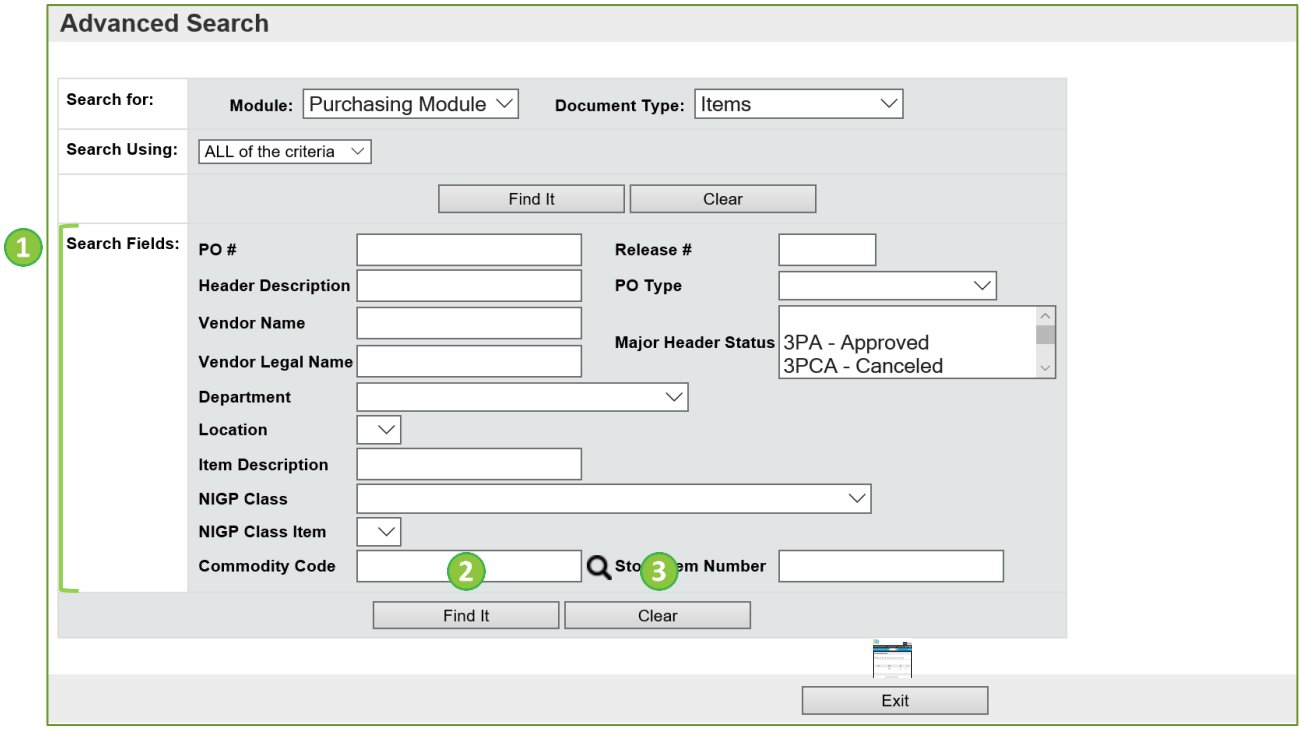


4. Click **Exit** to exit

Header Menu: Advanced Search: Items

The Advanced Search, Items allows users to search for Items within the user's access. While there could be many reasons for a user to search for Items, one example is to determine if certain items had been ordered previously in BidBuy.

1. Enter **Search Fields**
2. Click **Find It**
3. Click **Clear** to clear the display

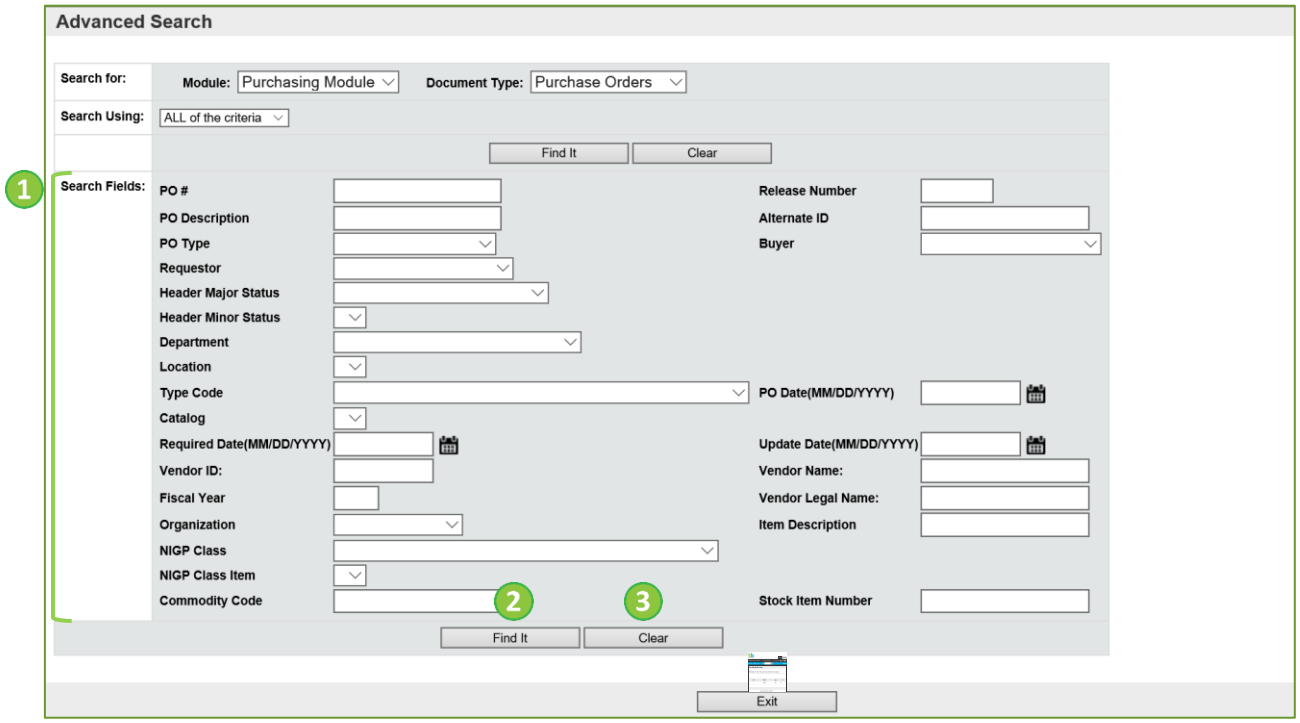


4. Click **Exit** to exit

Header Menu: Advanced Search: Purchase Orders

The Advanced Search, Purchase Orders allows users to search for any type of Purchase Order within the user's access. While there could be many reasons for a user to search for Purchase Orders, one example is to view Purchase Orders with a specific Type Code.

1. Enter **Search Fields**
2. Click **Find It**
3. Click **Clear** to clear the display

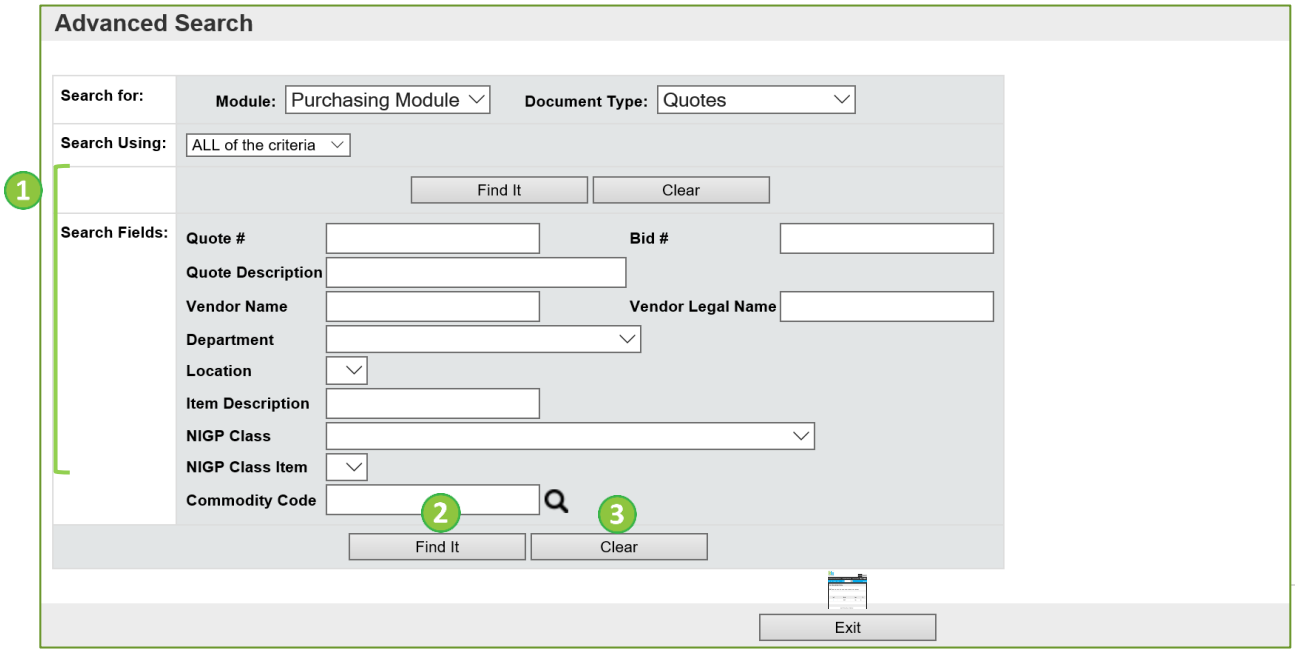


4. Click **Exit** to exit

Header Menu: Advanced Search: Quotes

The Advanced Search, Quotes allows users to search for Quotes within the user's access. While there could be many reasons for a user to search for Quotes, one example is to address a Vendor's question regarding their Quote.

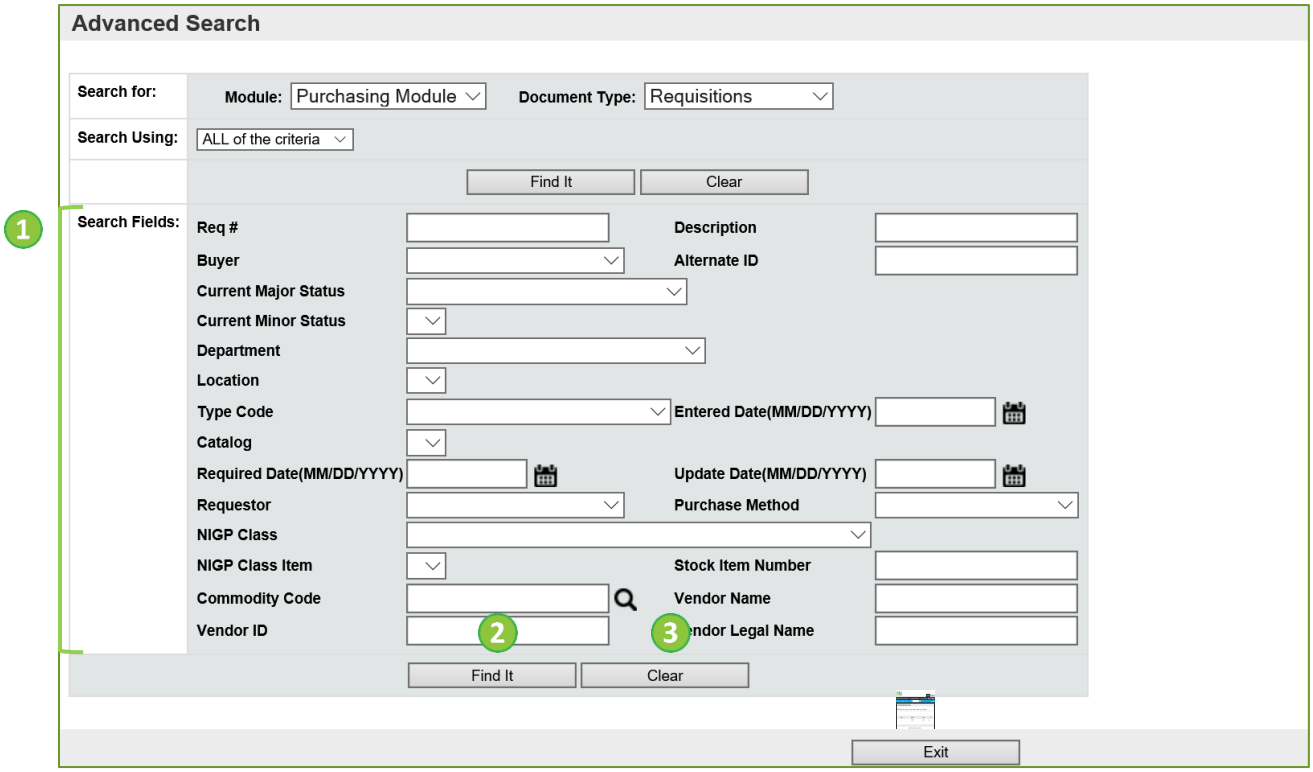
1. Enter **Search Fields**
2. Click **Find It**
3. Click **Clear** to clear the display
4. Click **Exit** to exit



Header Menu: Advanced Search: Requisitions

The Advanced Search, Requisitions allows users to search for Requisitions within the user's access. While there could be many reasons for a user to search for Requisitions, one example is to locate a Requisition when the status is not known.

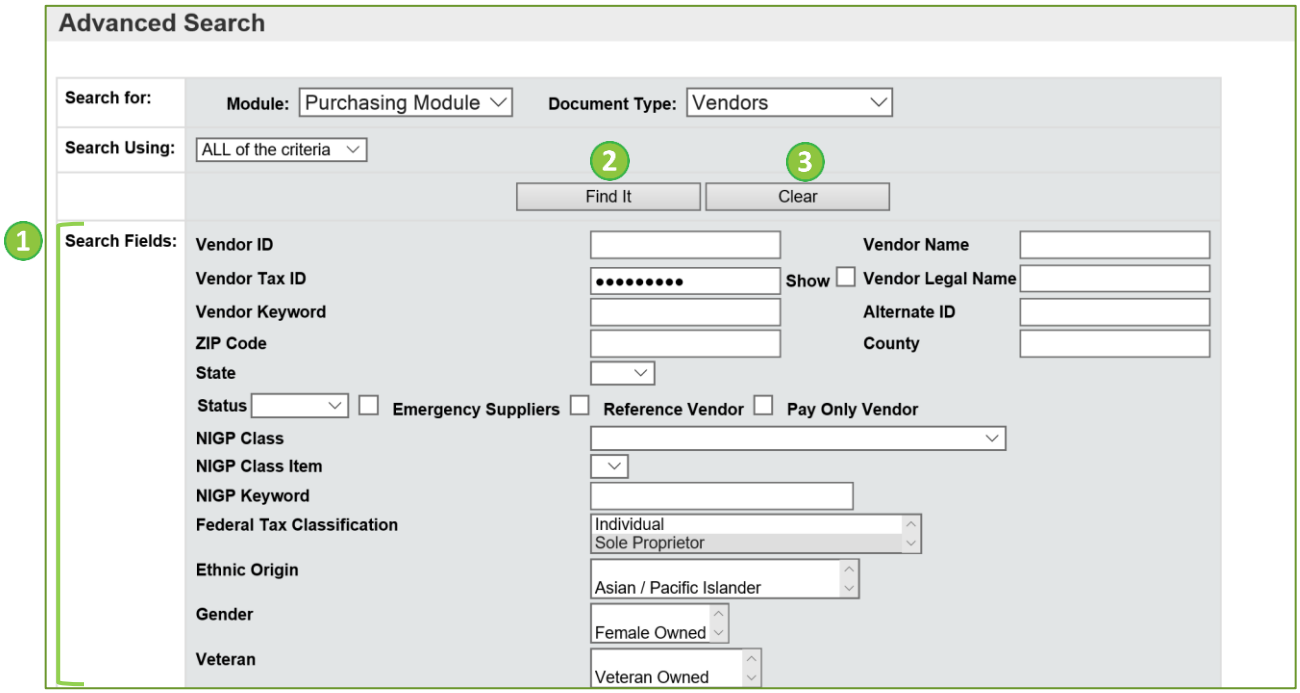
1. Enter **Search Fields**
2. Click **Find It**
3. Click **Clear** to clear the display
4. Click **Exit** to exit



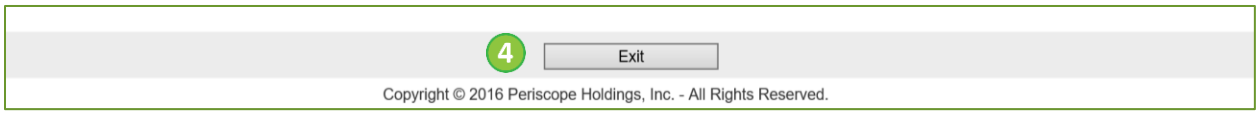
Header Menu: Advanced Search: Vendors

The Advanced Search, Vendors allows users to search for any registered Vendor in BidBuy. While there could be many reasons for a user to search for Vendors, one example is to review a Vendor's certifications.

1. Enter **Search Fields**
2. Click **Find It**
3. Click **Clear** to clear the display



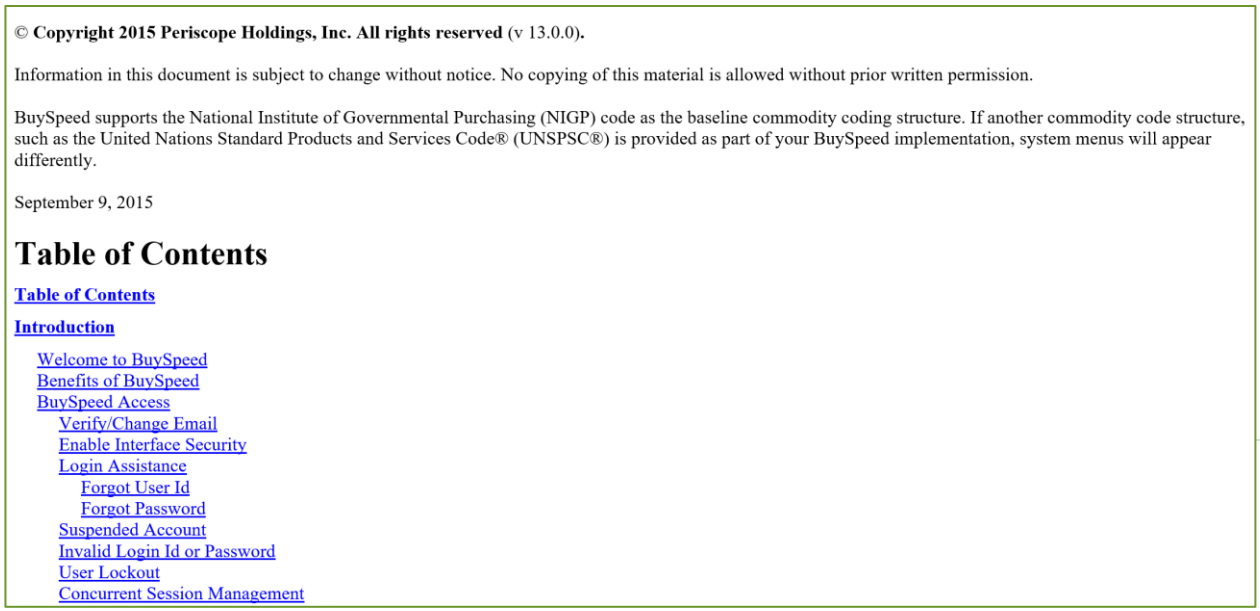
4. Click **Exit** to exit



Header Menu: Help

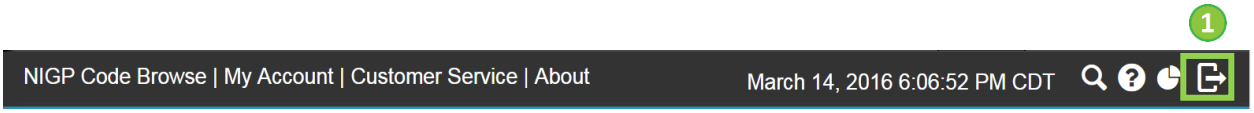
The Help Icon displays a reference manual for the software before being configured for the State. The online help can be used to find system field descriptions and system functionality explanations. The Help Manual is specific to the role selected by the user. State- specific BidBuy Manuals are available on the login page.

1. Click **Help** Icon the user is directed to the **BuySpeed Online User** manual
2. Scroll down to the **Table of Contents**
3. Click on **topic** and the user views the topic in the manual



Header Menu: Log Out

This allows the user to exit BidBuy.



1. Click **Log Out**

BidBuy automatically logs users off of the system after 30 minutes of inactivity. The user lockout for entering incorrect passwords is 15 minutes.

Navigation Menu

The **Navigation Menu** allows the user to move within the application and gives access to requisitions, open and closed bids, purchase orders, contracts, quotes and account maintenance.

The **Navigation Menu** is static and always displayed at the top of each page. This menu allows the user to access:

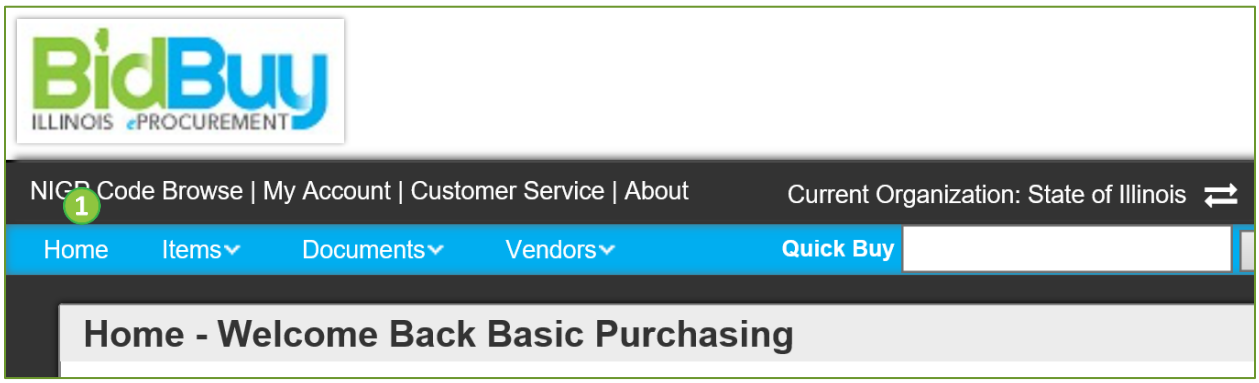
The Help Manual for the generic BuySpeed System displays on separate tab. BuySpeed is the system name for BidBuy.

- Home
- Items
- Documents
- Vendors
- Quick Buy
- User Name

Navigation Menu: Home

The **Home** Tab brings the user to the same set of tabs covered in the Home Page/Control Center section. It is the landing page that BidBuy opens to on successful Login.

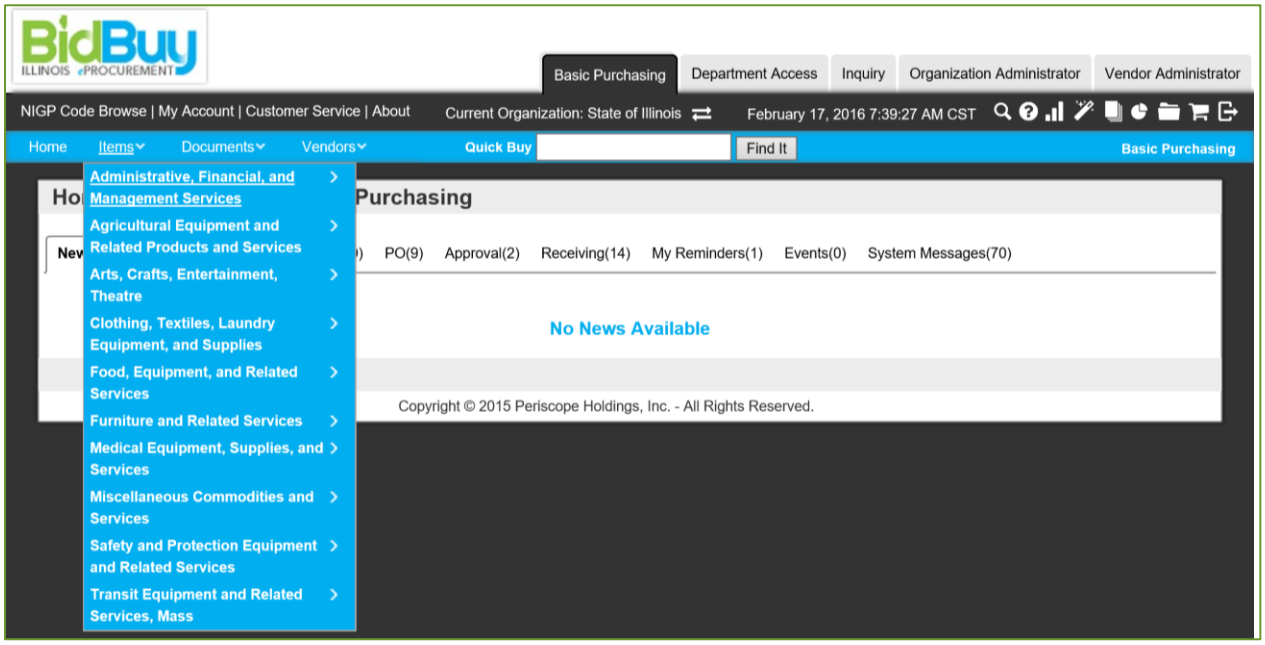
1. Click **Home**



Navigation Menu: Items

The Items menu shows groupings of items on all blanket Purchase Orders (POs) created in the BidBuy system. The link populates the NIGP categories and the arrows to the right of those headings will provide a drop down list of the Class/Class Items of that super-group.

This link ONLY searches items that are on Master Blanket Purchase Orders.

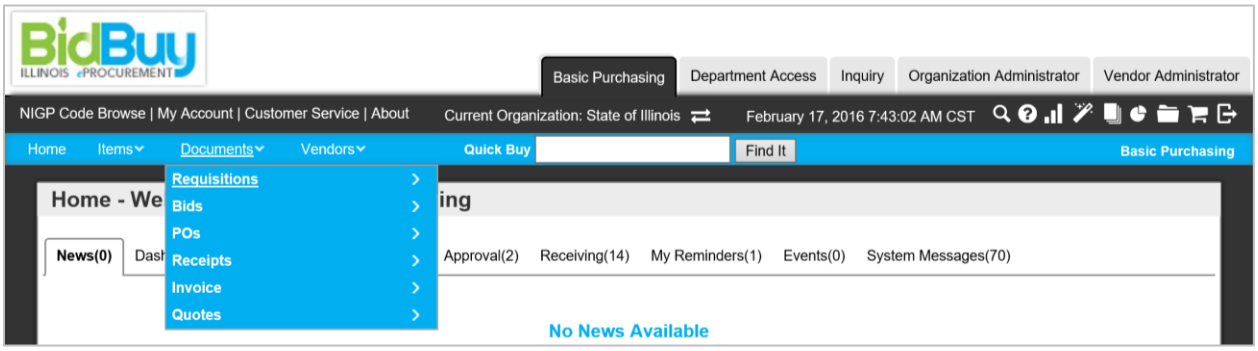


Navigation Menu: Documents

The Documents menu includes navigation to documents filtered by its current status, BidBuy documents are

- **Requisitions** to locate requisition documents in BidBuy
- **Bids** to locate bid documents in BidBuy
- **POs** to locate PO documents in BidBuy
- **Receipts** to locate receipt documents in BidBuy (Not used by the State)
- **Invoice** to locate invoices in BidBuy (Not used by the State)

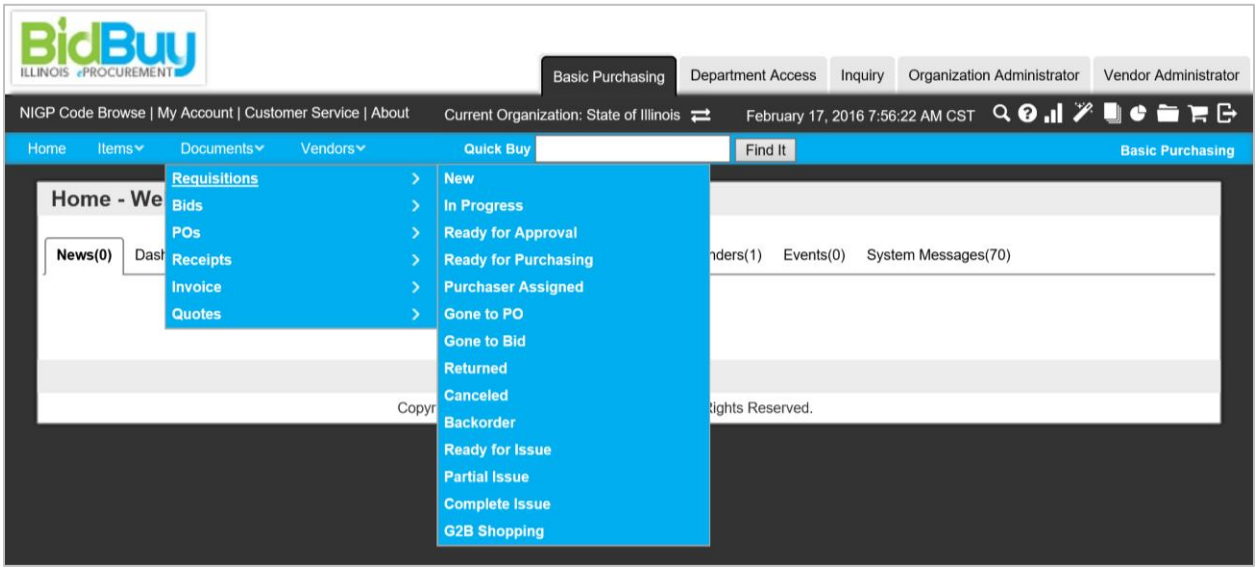
- **Quotes** to locate quotes in BidBuy



Requisitions

From the dropdown selections the user can select:

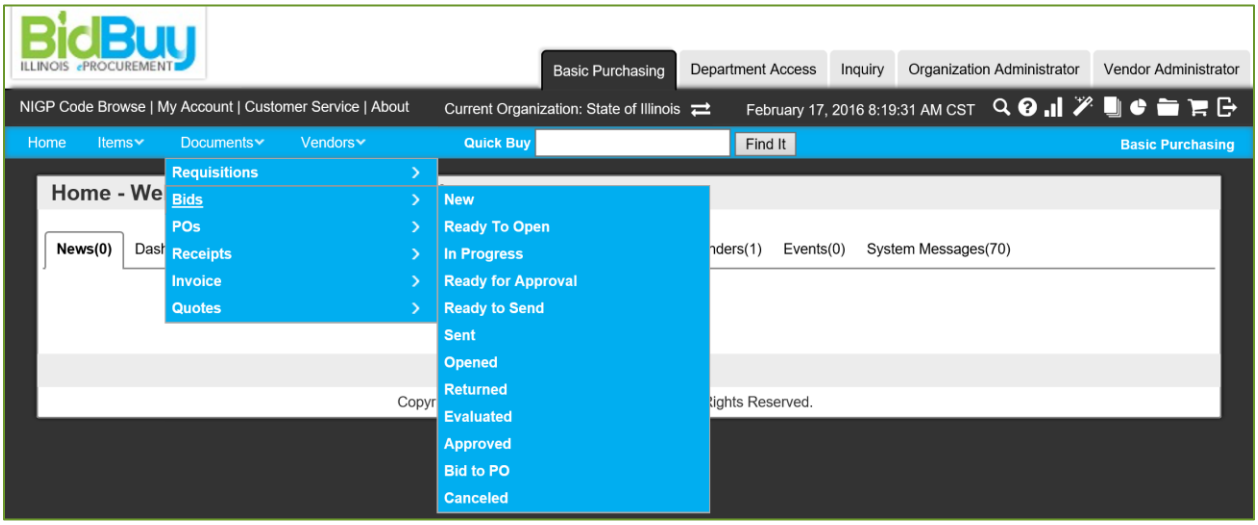
- **New** to create a new requisition
- **In Progress** to view all in progress requisitions
- **Ready for Approval** to view all ready for approval requisitions
- **Ready for Purchasing** to view all ready for purchasing requisitions
- **Purchaser Assigned** to view all purchaser assigned requisitions
- **Gone to PO** to view all gone to PO requisitions
- **Gone to Bid** to view all gone to bid requisitions
- **Returned** to view all returned requisitions
- **Cancelled** to view all cancelled requisitions
- **Backorder** to view all backorder requisitions **(not used by State of Illinois)**
- **Ready for Issue** to view all ready for issue requisitions **(not used by State of Illinois)**
- **Partial Issue** to view all partial issue requisitions **(not used by State of Illinois)**
- **Complete Issue** to view all complete issue requisitions **(not used by State of Illinois)**
- **G2B Shopping** Punchout (if configured, not used by the State currently)



Bids

From the dropdown selections the user can select:

- **New** to create a new bid (BP only)
- **Ready to Open** to view all ready to open bids (BP only)
- **In Progress** to view all in progress bids
- **Ready for Approval** to view all ready for approval bids
- **Ready to Send** to view all ready to send bids
- **Sent** to view all sent bids
- **Opened** to view all open bids
- **Returned** to view all returned bids
- **Evaluated** to view all evaluated bids
- **Approved** to view all approved bids
- **Bid to PO** to view all bids converted to PO
- **Cancelled** to view all cancelled bids

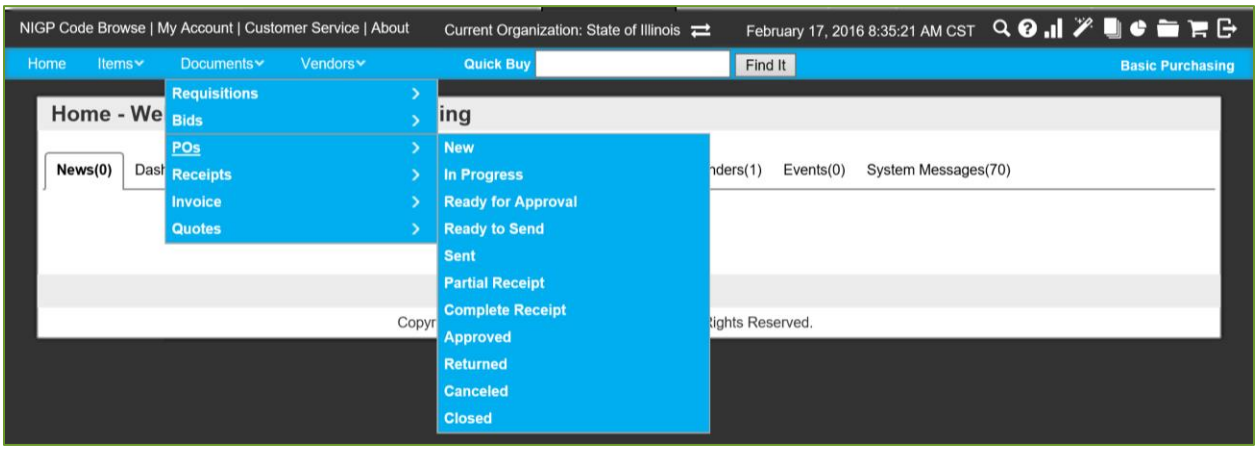


POs

From the dropdown selections the user can select:

- **New** to create a new PO (BP only)
- **In Progress** to view all in progress POs
- **Ready for Approval** to view all ready for approval POs
- **Ready to Send** to view all ready to send POs
- **Sent** to view all sent POs
- **Partial Receipt** to view all partial receipt POs
- **Complete Receipt** to view all complete receipt POs
- **Approved** to view all approved POs

- **Returned** to view all returned POs
- **Cancelled** to view all canceled POs

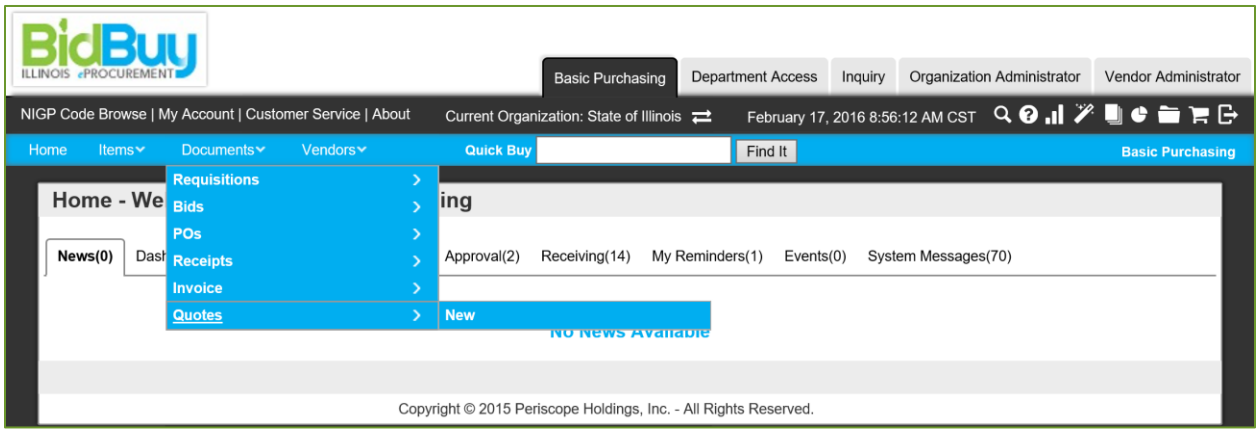


- **Closed** to view all closed POs

Receipts and Invoices (Not used by the State)

Quote

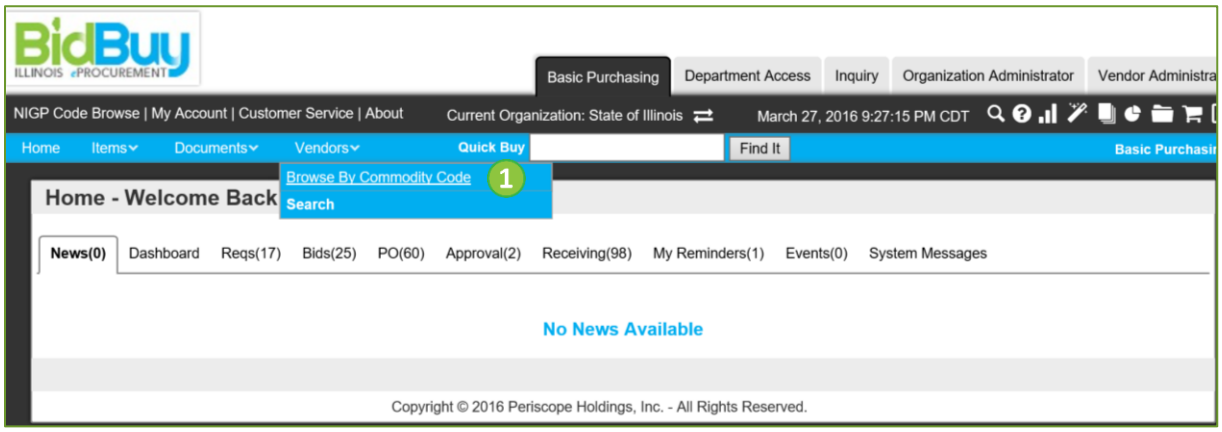
Select the dropdown link to enter new vendor quote for a Bid that has been opened. This is done when a Quote is submitted outside of BidBuy by a Vendor, for instance when the Quote is mailed in as a hardcopy or via fax.



Browse Vendors by Commodity Code

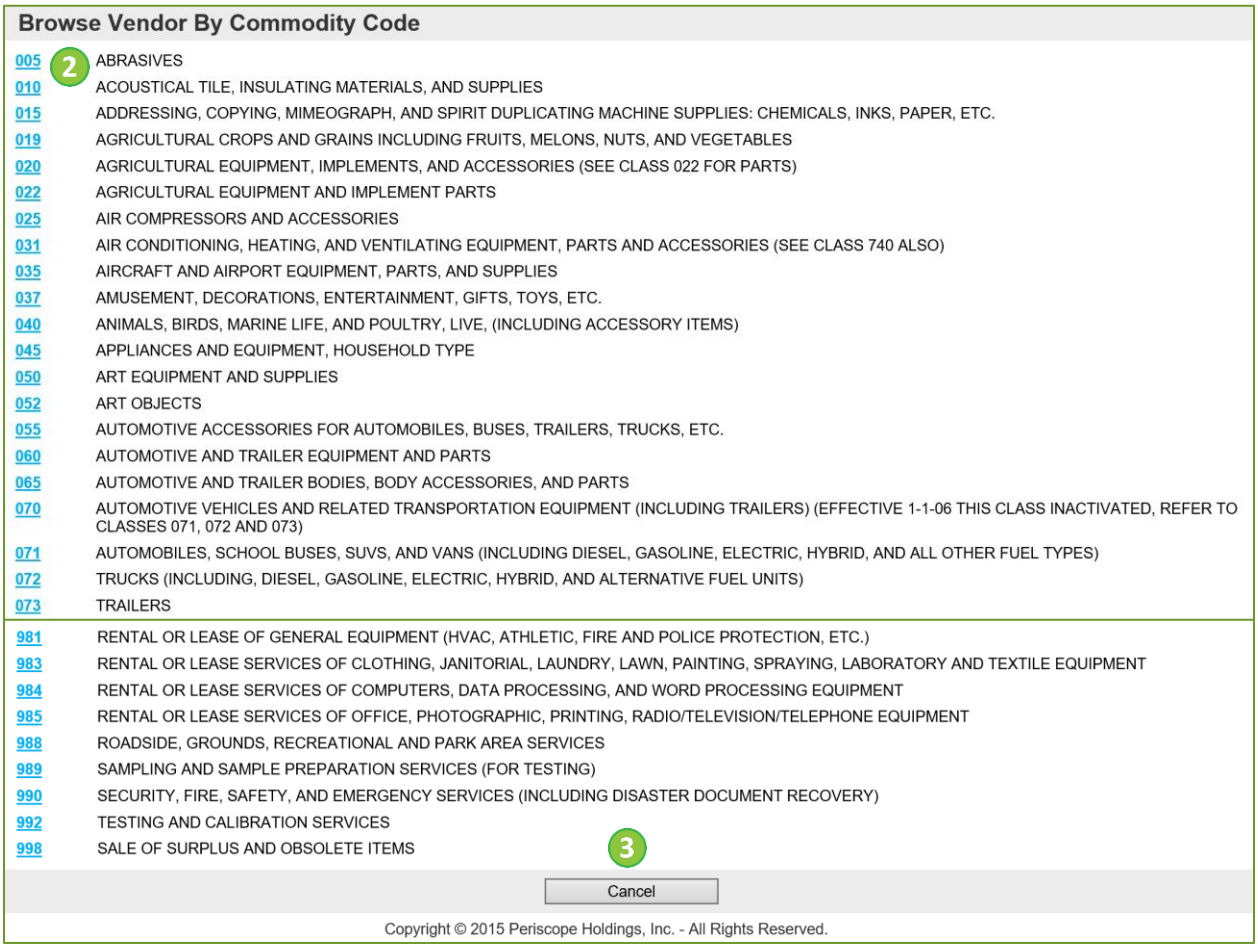
If a user wants to find which vendors have registered as providing a particular commodity, from the Vendor dropdown menu, select Browse by Commodity Code hyperlink to display the NIGP three digit classes. The State uses NIGP codes to classify goods and services.

1. Select **Browse By Commodity Code**

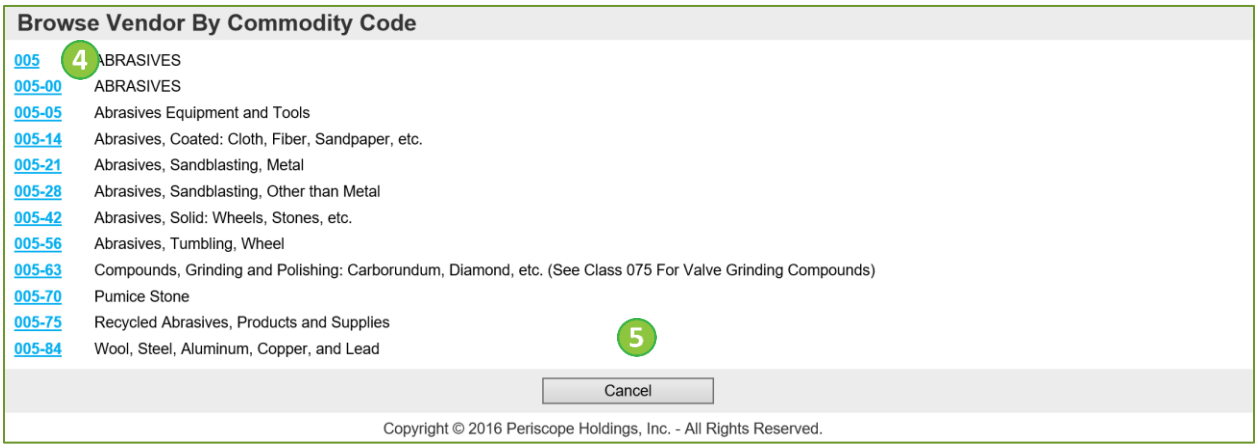


2. Click the three-digit commodity code class hyperlink to view the five digit class/subclass

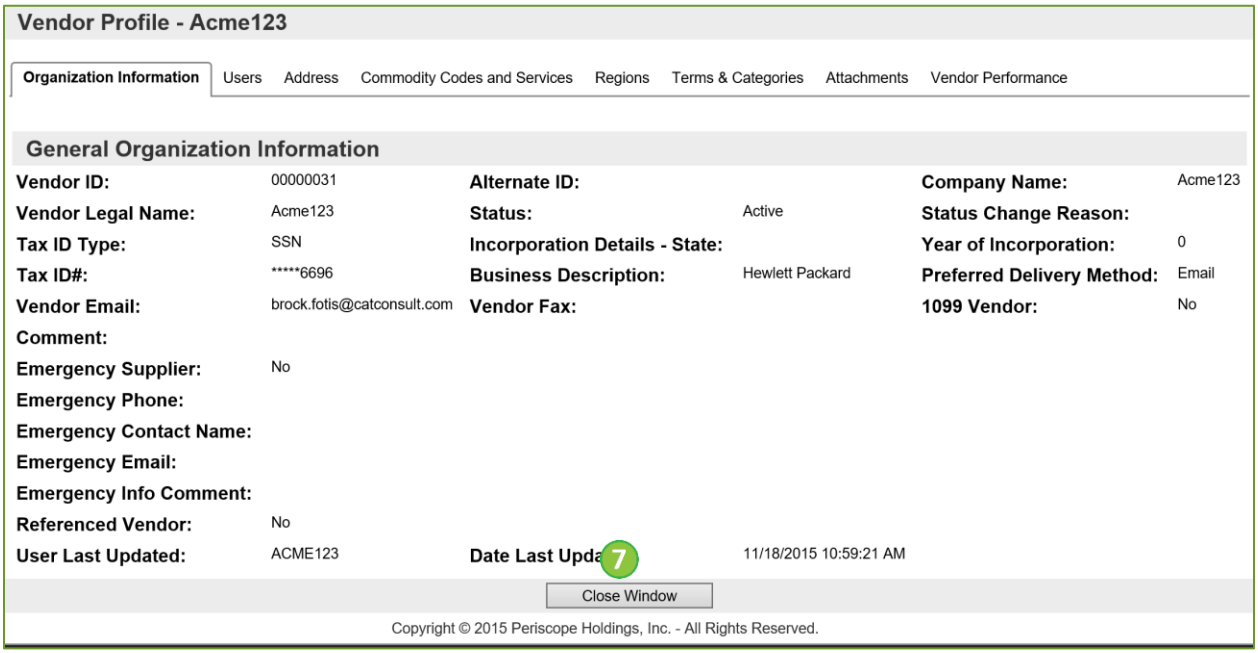
3. Click **Cancel** to cancel



4. Click **the** five-digit commodity code **hyperlink** to view vendors
5. Click **Cancel** to Return to the commodity class level page



6. Click the vendor name **hyperlink** to display a pop-up of the vendor profile information



7. C lick **Close Window** to exit

Navigation Menu: Quick Buy

Quick Buy is a feature in BidBuy that allows the user to search for items available under blanket contracts directly from the tool bar. Quick Buy is an alternate way to create a new requisition document. The system will search by item description.

Full functionality of Quick Buy is in the specific procurement manuals.

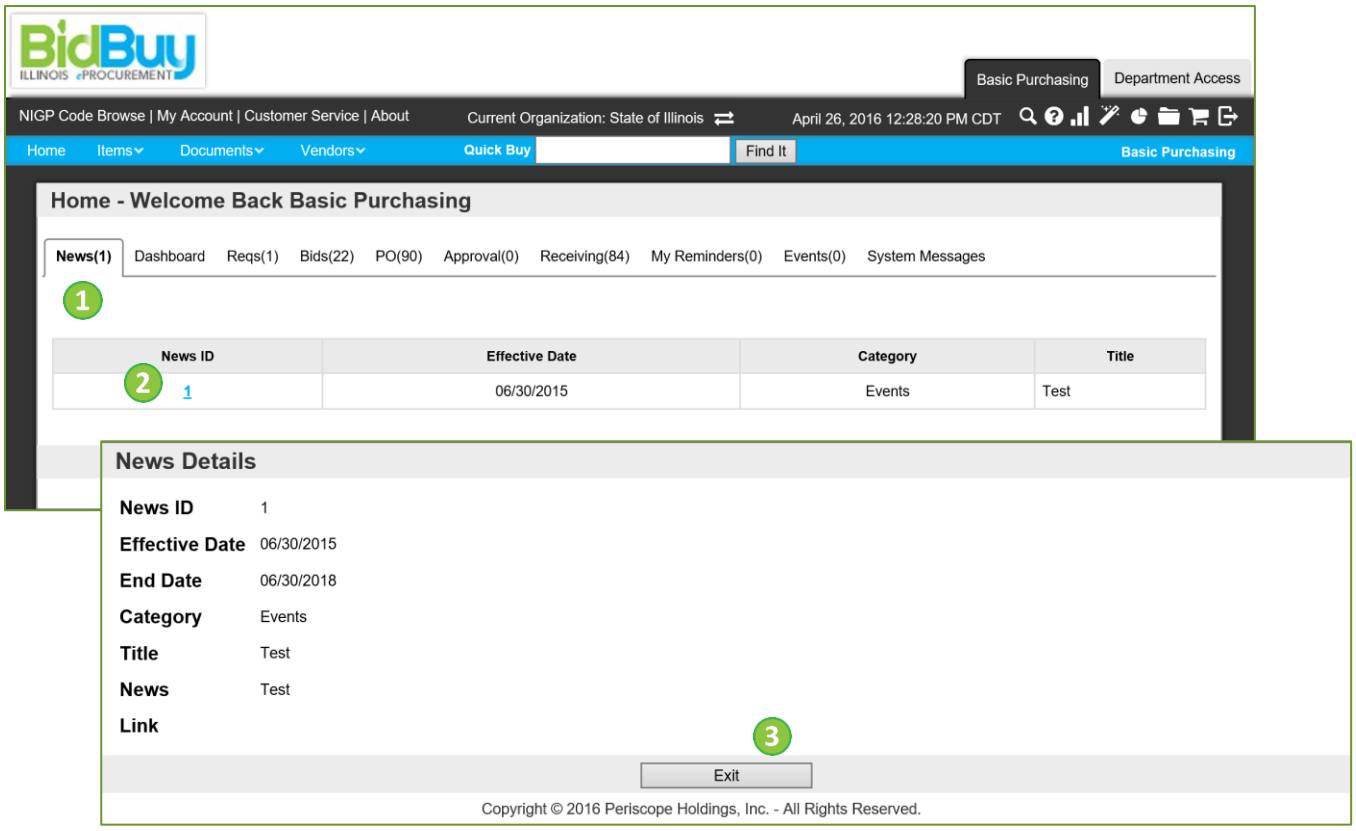
Control Center

The **Control Center** is organized by tabs and allows the user to navigate to specific information in BidBuy. **Control Center** tabs are:

- News
- Dashboard
- Reqs
- Bids
- PO
- Approval
- Receiving (not used by State currently)
- My Reminders
- Events (not used by State currently)
- System Messages

Control Center: News

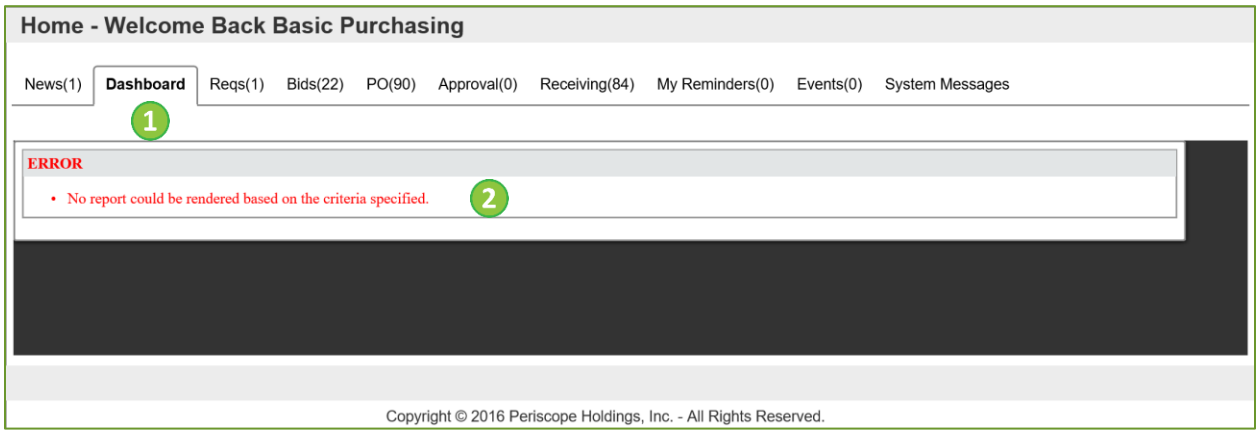
1. Click **News (count)** to displays News Items
2. Click News ID for document to view
3. Click **Exit** to exit



News: Displays System Administrator created updates

Control Center: Dashboard

1. Click **Dashboard** to view Reporting Dashboard for the Organization and Role as configured
2. Any configured reports will display otherwise red error



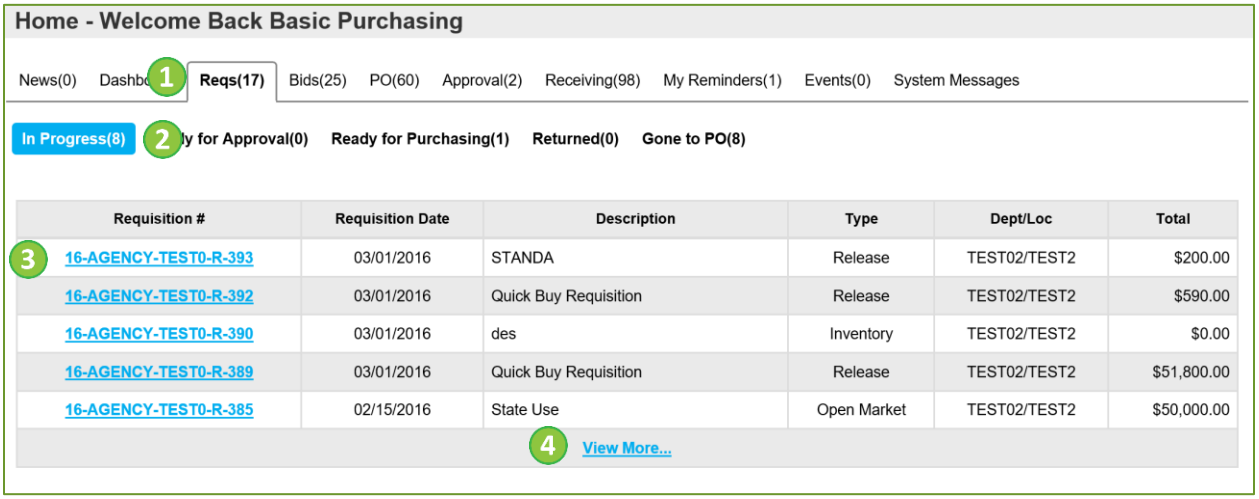
Dashboard: Displays Information Dashboard if configured.

Control Center: Reqs

The requisition statuses shown here indicate requisitions that may require some action to be taken.

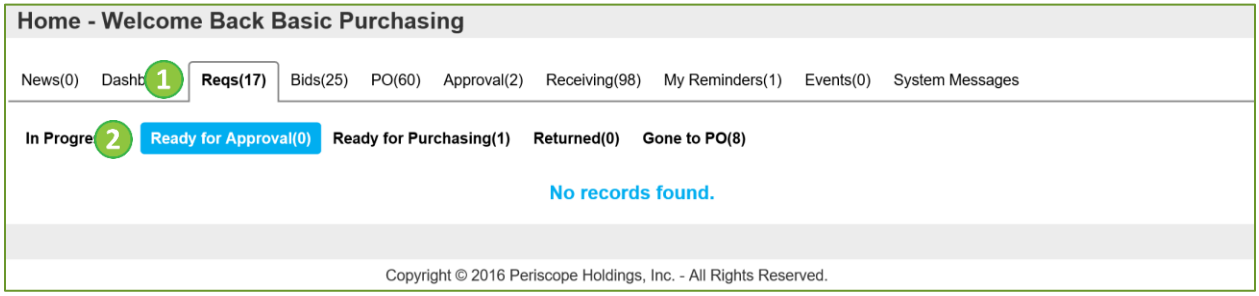
Reqs: In Progress

1. Click **Reqs** tab
2. Click **In Progress** sub tab to display in progress requisitions
3. Click hyperlink **Requisition #** to navigate to requisition details
4. Click **View More…** to retrieve all requisitions



Reqs: Ready for Approval

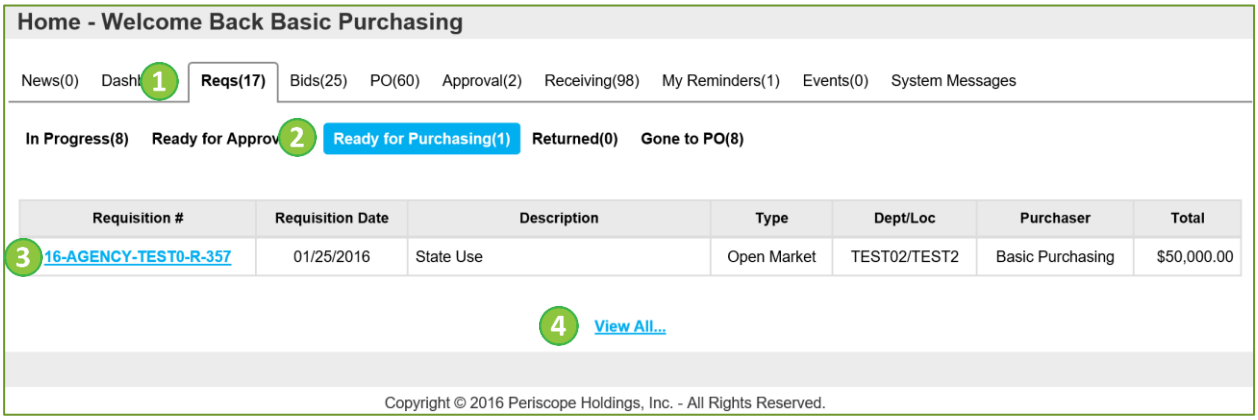
1. Click **Reqs** tab
2. Click **Ready for Approval** subtab to display ready for approval requisitions



If no information exists the system displays **No records found**

Reqs: Ready for Purchasing

1. Click **Reqs** tab
2. Click **Ready for Purchasing** to display ready for purchasing requisitions
3. Click hyperlink **Requisition #** subtab to navigate to requisition details

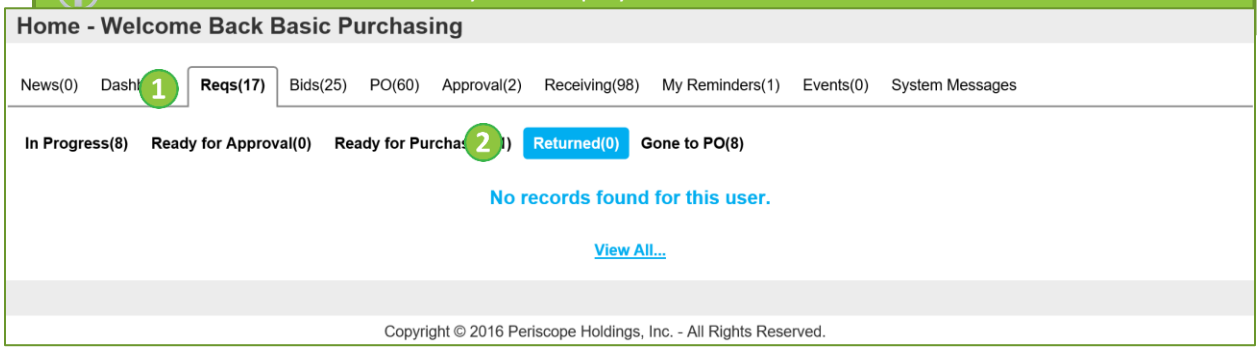


4. Click **View All** to view all ready for purchasing requisitions

Reqs: Returned

1. Click **Reqs** tab
2. Click **Returned** subtab to display returned requisitions for the user

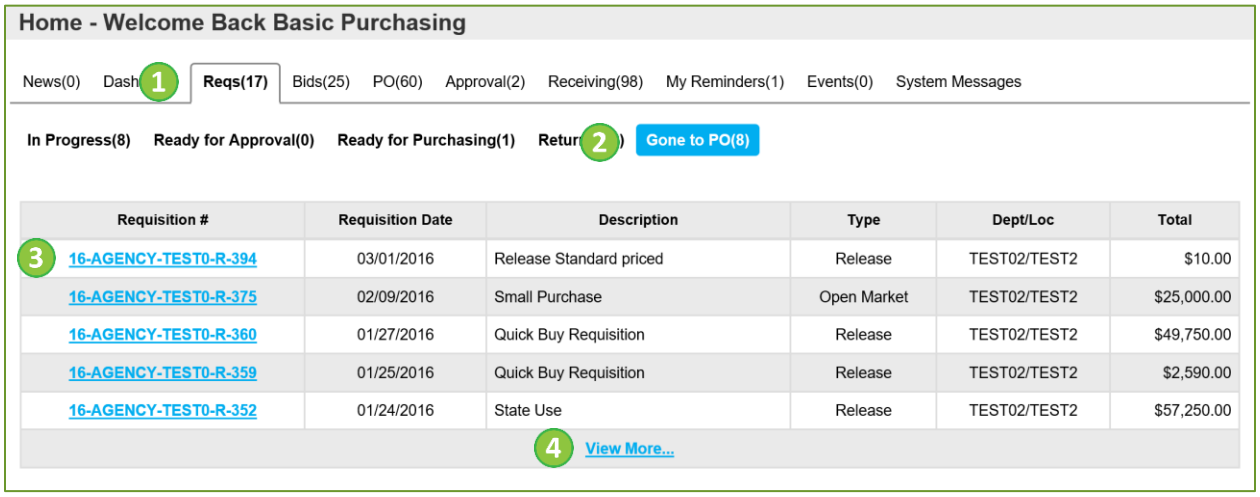
If no information exists the system displays **No records found for this user.**



3. Click **View All** to retrieve all returned POs for all users

Reqs: Gone to PO

1. Click **Reqs** tab
2. Click **Gone to PO** subtab to display gone to PO requisitions
3. Click hyperlink **Requisition Number** to navigate to requisition details



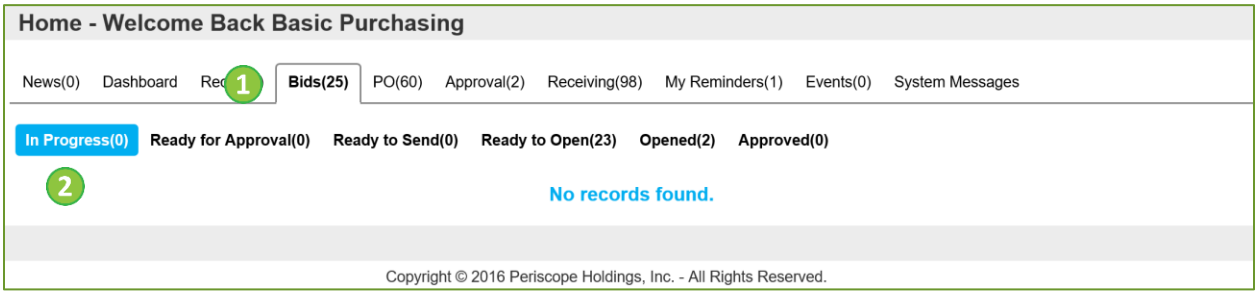
4. Click **View More** to retrieve more documents

Control Center: Bids

The bid statuses shown here indicate bids that may require some action to be taken. The Bids tab is only available to BP users.

Bids: In Progress

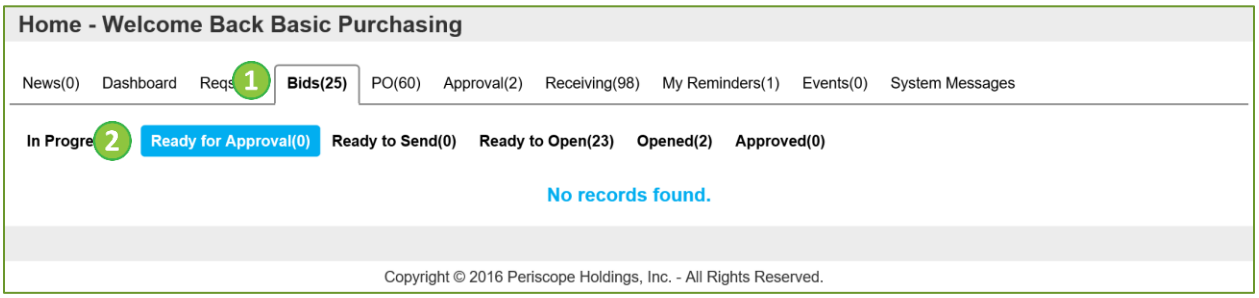
1. Click **Bids** tab
2. Click **In Progress** subtab to display in progress bids



If no information exists the system displays **No records found.**

Bids: Ready for Approval

1. Click **Bids** tab

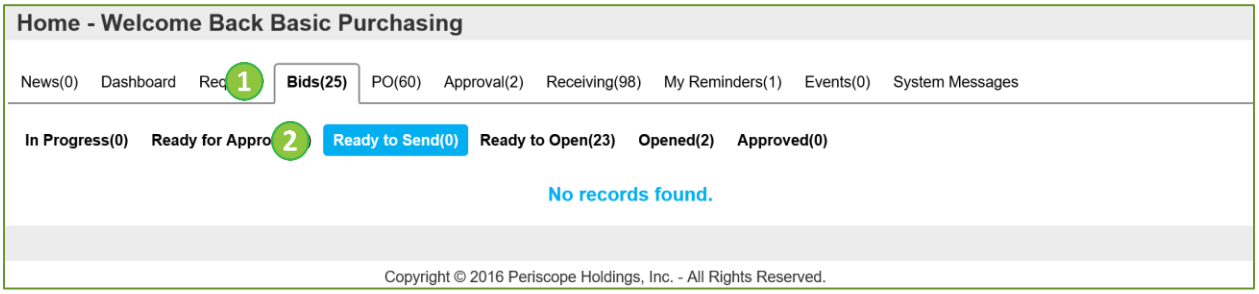


If no information exists the system displays **No records found**

2. Click **Ready for Approval** subtab to display ready for approval bids

Bids: Ready to Send

1. Click **Bids** tab
2. Click **Ready to Send** sub tab to display ready to send bids

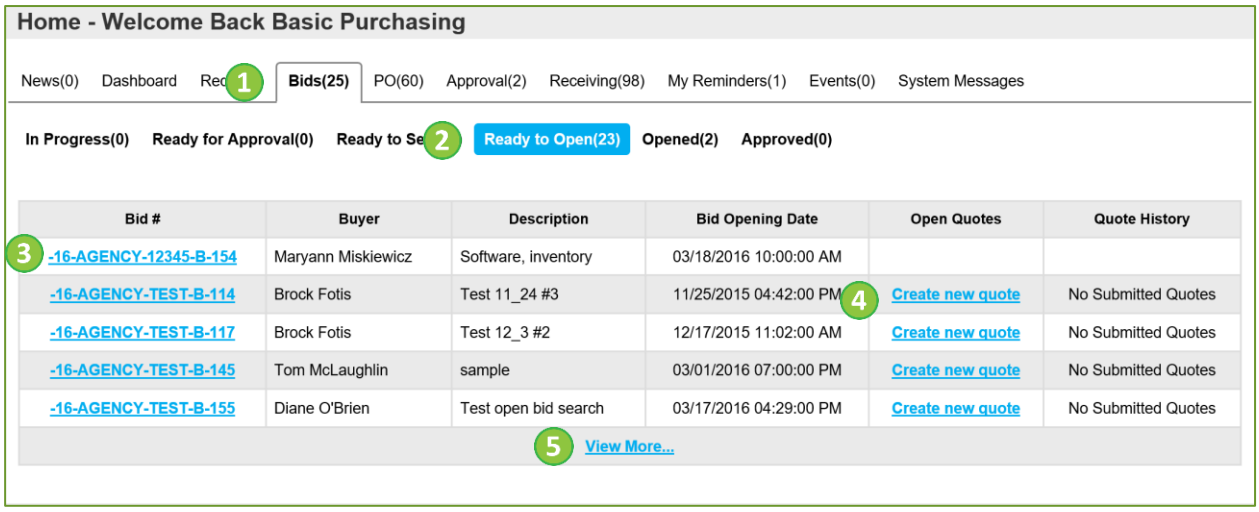


If no information exists the system displays **No records found**

Bids: Ready to Open

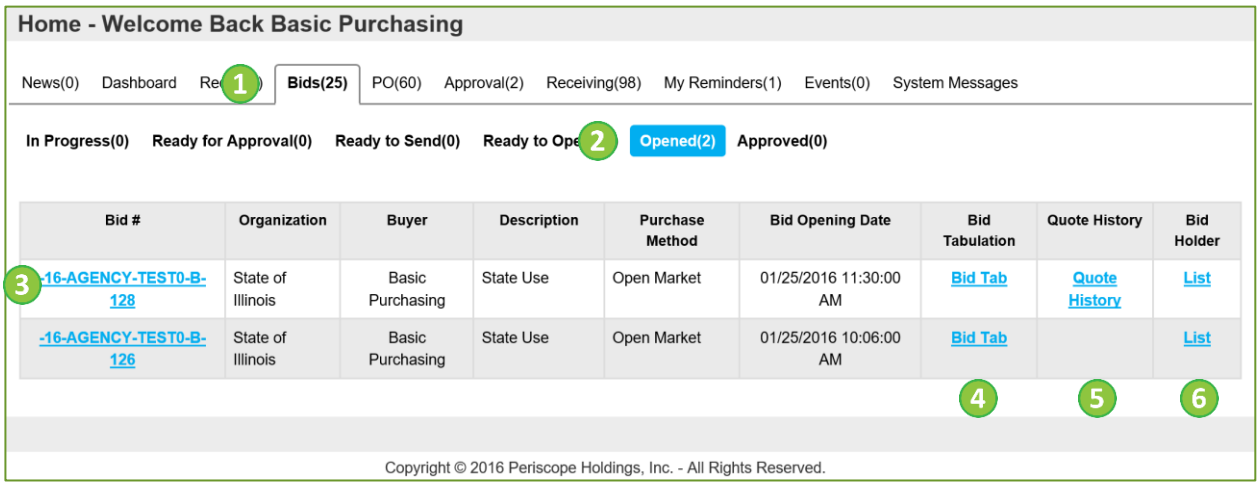
1. Click **Bids** tab
2. Click **Ready to Open** subtab to display ready to open bids
3. Click hyperlink **Bid Number** to navigate to Bid details
4. Click **Create new quote** to create new quote

5. Click **View More** to retrieve more documents



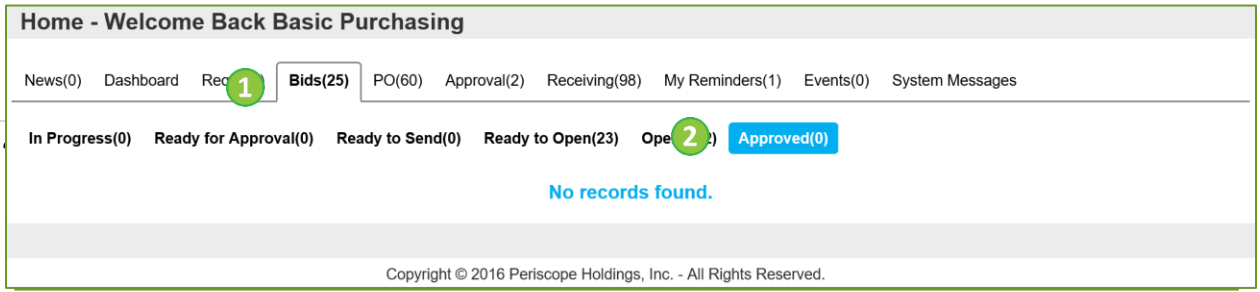
Bids: Opened

1. Click **Bids** tab
2. Click **Opened** subtab to display opened bids
3. Click hyperlink **Bid #** to navigate to bid details
4. Click hyperlink **Bid Tabulation** to navigate to bid tabulation
5. Click hyperlink **Quote History** to view quote history
6. Click hyperlink **List** to view bid holder list



Bids: Approved

1. Click **Bids** tab
2. Click **Approved** subtab to display approved bids

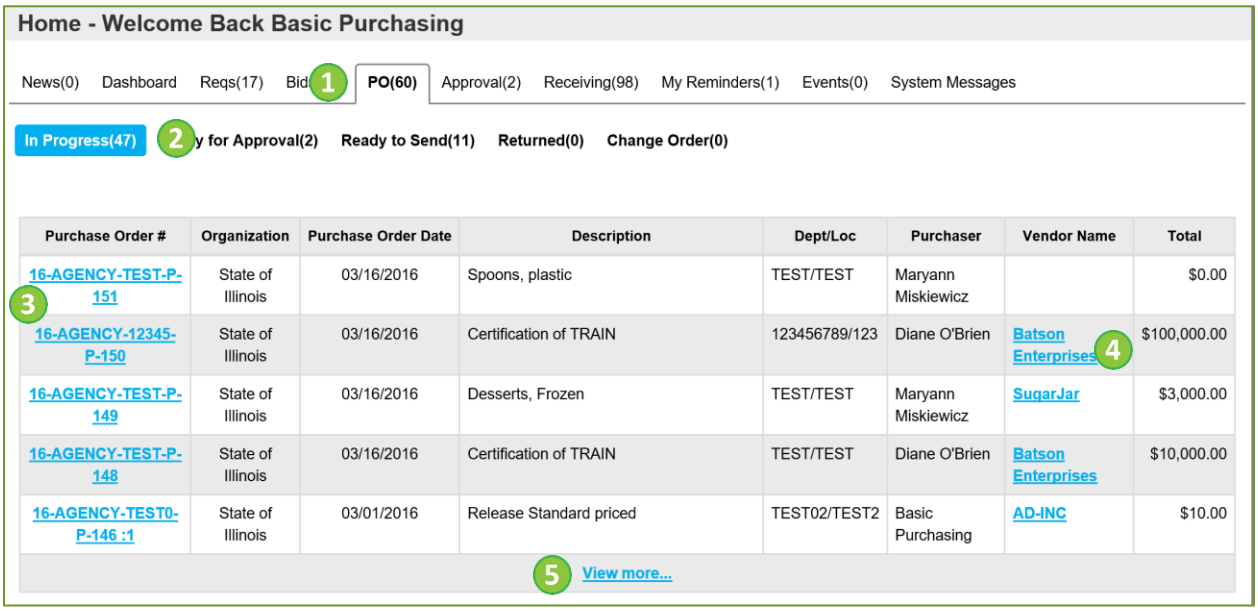


Control Center: PO

The PO statuses shown here indicate Purchase Orders that may require some action to be taken. DA users will only see Purchase Orders that are Ready To Send.

PO: In Progress

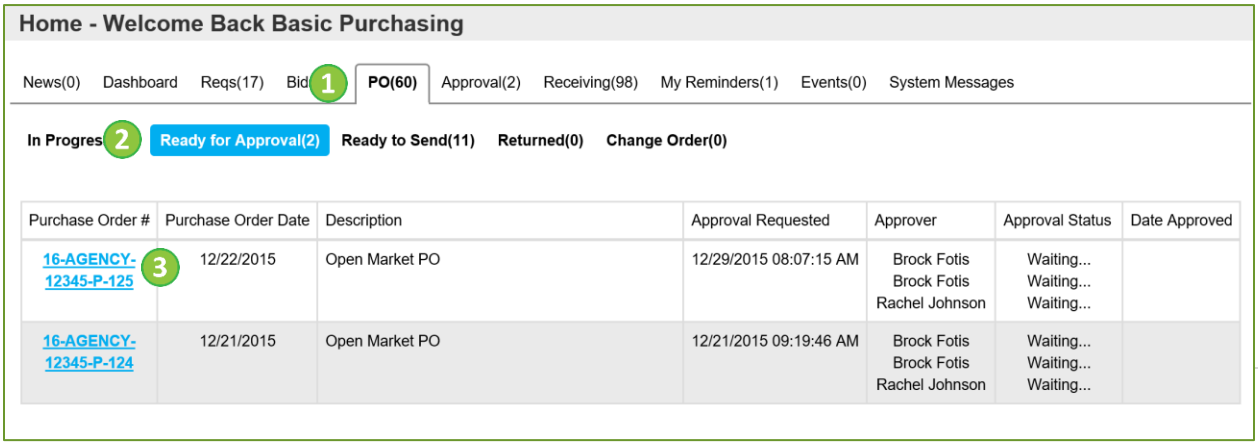
1. Click **PO** tab
2. Click **In Progress** sub tab to display in-progress POs
3. Click hyperlink **Purchase Order #** to navigate to PO details
4. Click hyperlink **Vendor Name** to navigate to vendor details



5. Click **View More…** to retrieve more PO documents

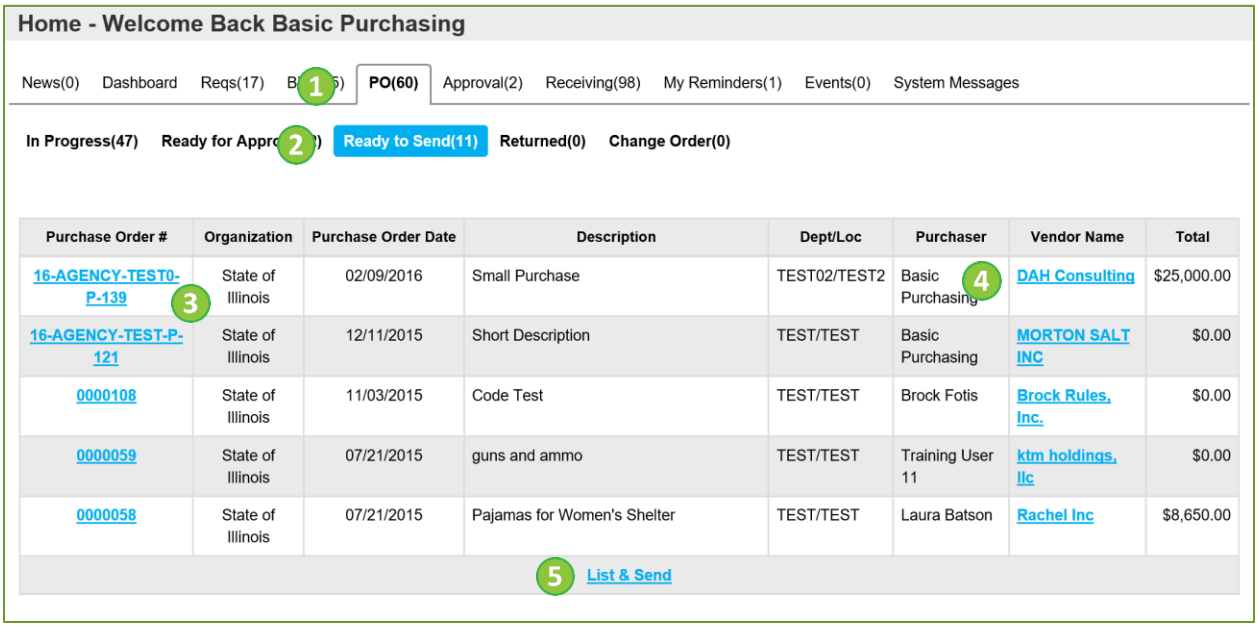
PO: Ready for Approval

1. Click **PO** tab
2. Click **Ready for Approval** subtab to display ready for approval POs
3. Click hyperlink **Purchase Order #** to navigate to PO details



PO: Ready to Send

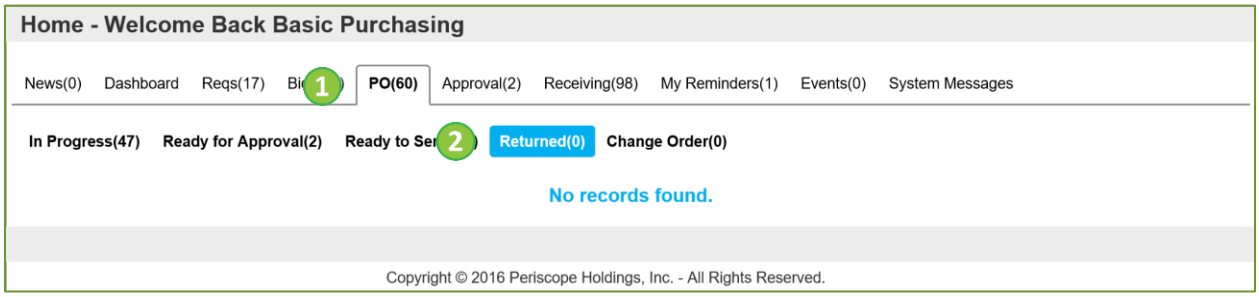
1. Click **POs** tab
2. Click **Ready to Send** subtab to display ready to send POs
3. Click hyperlink **Purchase Order #** to navigate to PO details
4. Click on hyperlink **Vendor Name** to navigate to vendor details



5. Click **List & Send** to list and send all POs

PO: Returned

1. Click **POs** tab

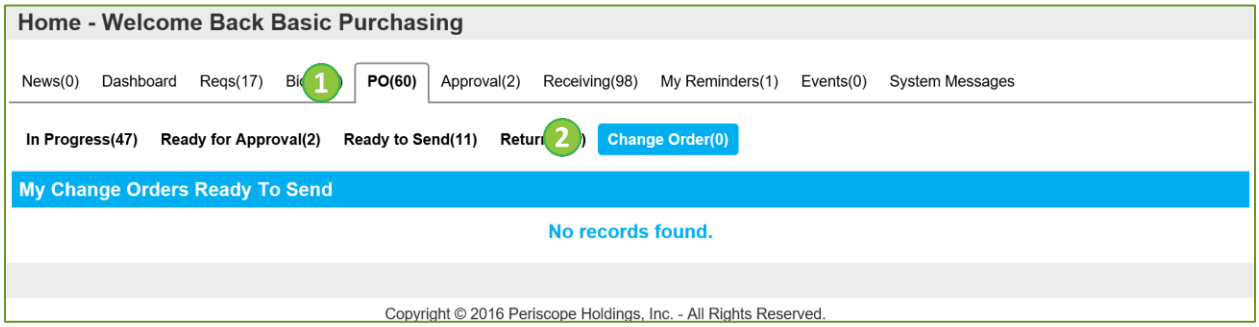


If no information exists the system displays. No records found.

2. Click **Returned** subtab to display returned POs

PO: Change Order

1. Click **POs** tab
2. Click **Change Order** to display **My Change Orders Ready To Send**



If no information exists the system displays No records found.

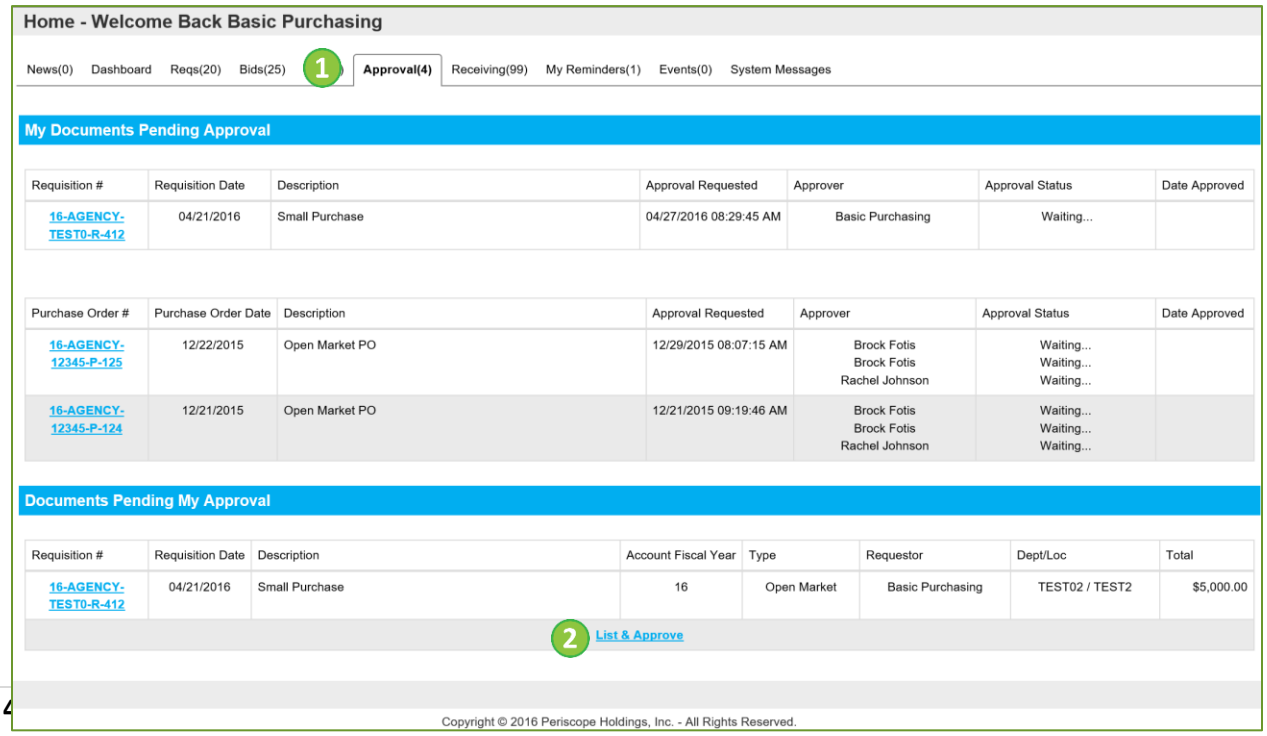
Control Center: Approval

Approvals are separated by document types: Requisitions, Bids and Purchase Orders. At the bottom center, there is a link called List & Approve.

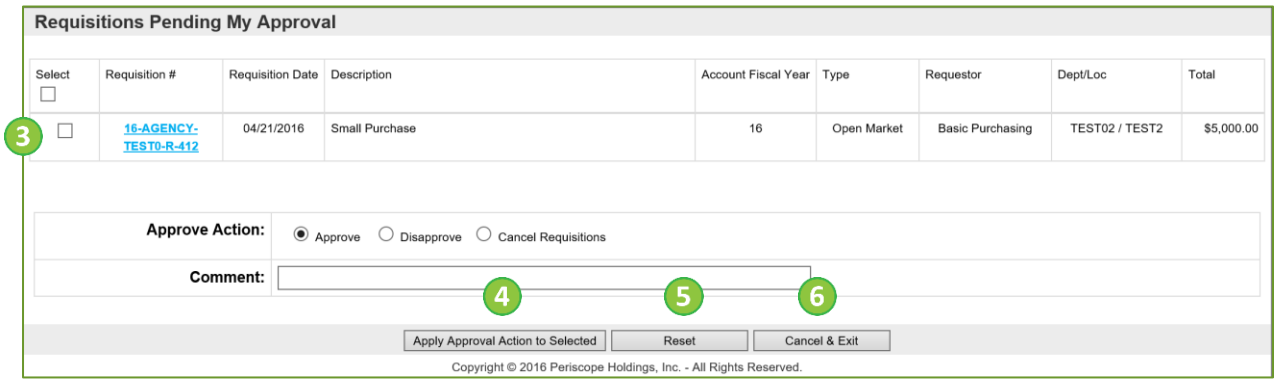
1. Click **Approval** tab to list and approve documents pending user approval

The approvals are categorized by My Documents Pending Approval by others and Documents Pending My Approval where the user is the approver.

2. Click **List & Approve** to approve documents



3. Select Document to approve
4. Click **Apply Approval Action to Selected** to approve selected
5. Click **Reset** to reset display
6. Click **Cancel & Exit** to exit



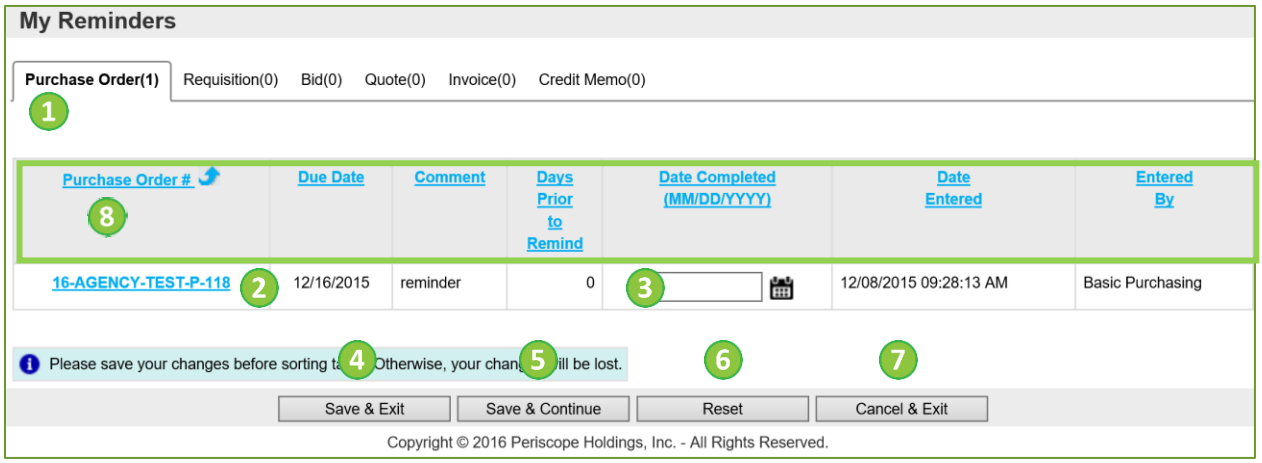
Control Center: Receiving (Not used by the State)

Control Center: Reminders

Reminders are created by either you or other system users to remind you to take some action on a specific document by a specific time.

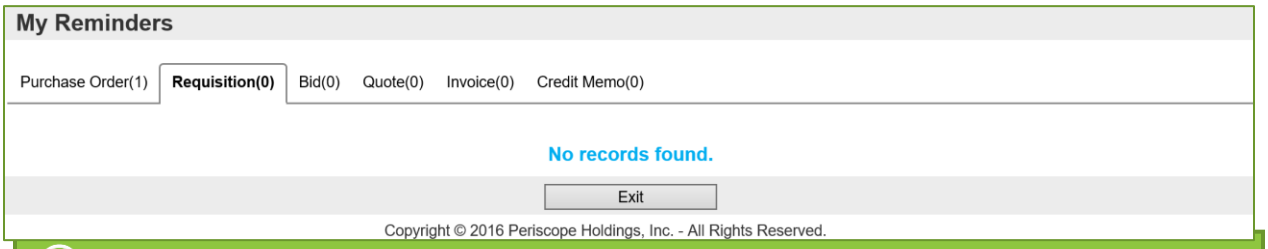
Reminders: Purchase Order

1. Click **Reminders** tab
2. Click hyperlink **Purchase Order #** to navigate to PO details
3. Enter **Date Completed**
4. Click **Save & Exit** to save and exit
5. Click **Save & Continue** to save and continue
6. Click **Reset** to clear screen and start over
7. Click **Cancel & Exit** to exit
8. Click **Column heading** to sort the display



Control Center: System Messages

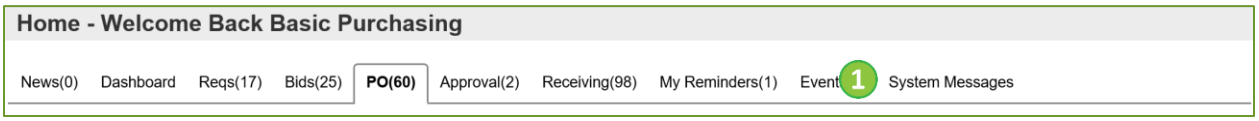
The system messages tab displays transaction queue messages.



The other tabs for Requisition, Bid, and Quote work the same. If no information exists the system displays No records found.

The State does not use Invoices or Credit Memos.

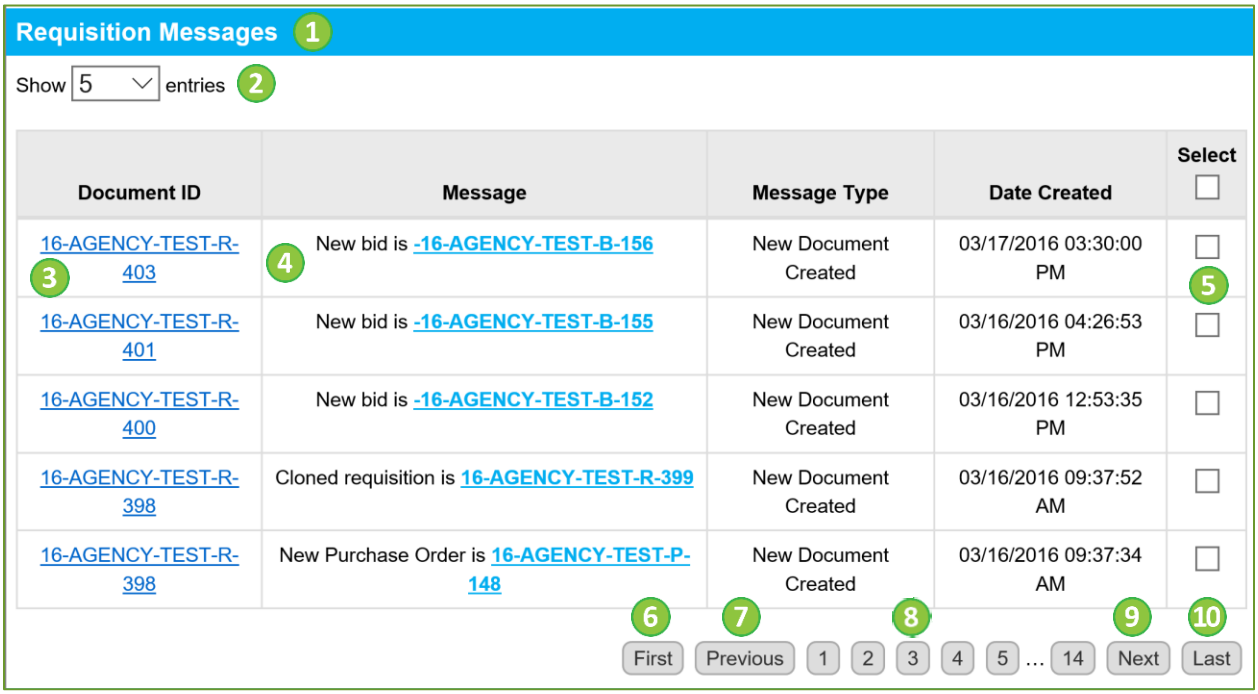
1. Click **System Messages** tab



Select **Show All** displays all system Messages.
Select **Show Errors** displays only system errors.
Select **Show Warnings** displays only warnings.
Select **Show in Progress** displays messages for in progress documents.

System Messages: Requisition Messages

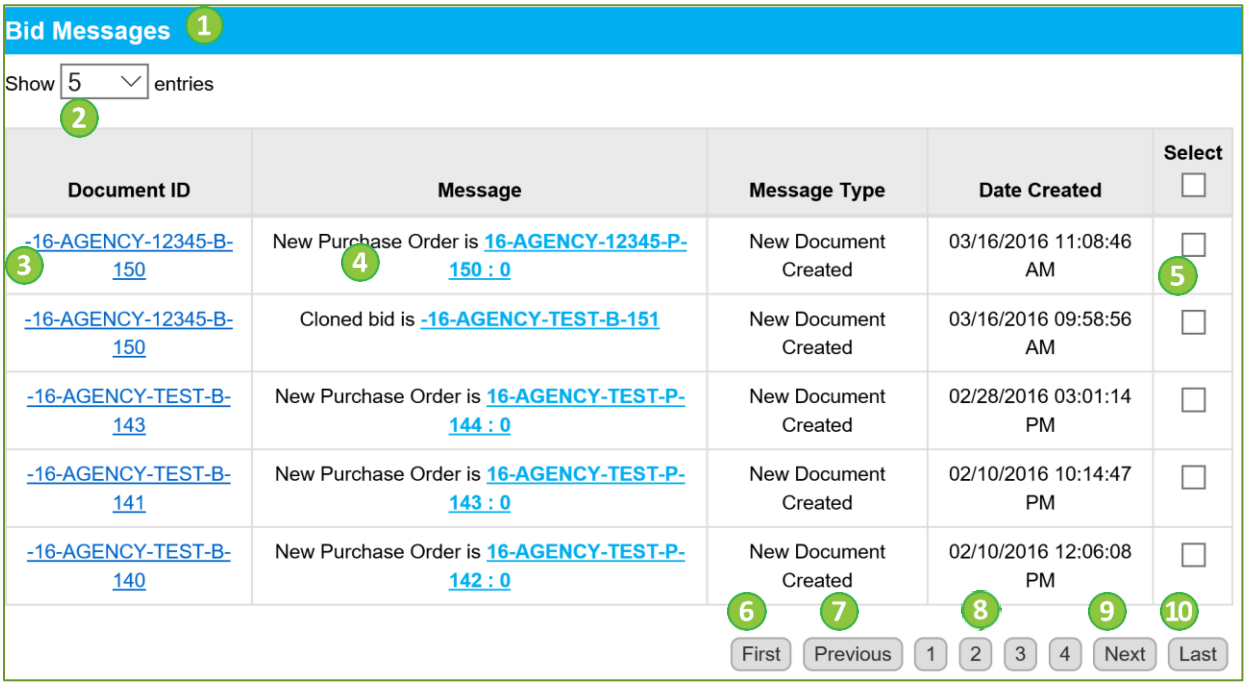
1. Scroll down to **Requisition Messages** section
2. Select **number** of messages to display in this section
3. Click hyperlink **Document ID** to display requisition details
4. Click hyperlink **Message** to navigate to document in message
5. Select **Select** to select message
6. Click **First** to go to the first message in the queue
7. Click **Previous** to go to the previous page
8. Click **page number** to go to a page number
9. Click **Next** to go to the next page



10. Click **Last** to go to last page

System Messages: Bid Messages

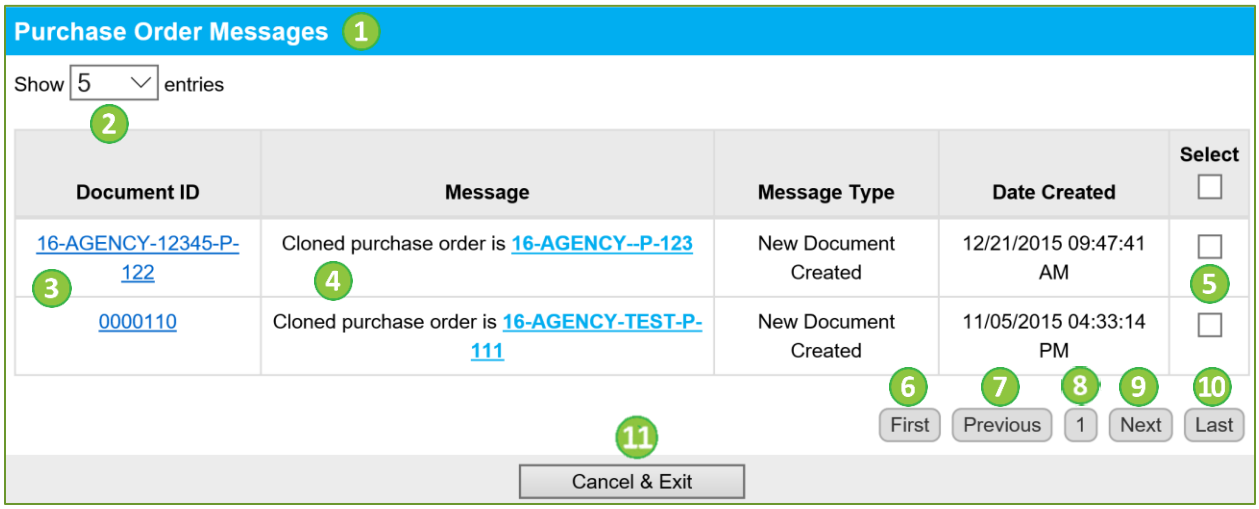
1. Click **System Messages** tab, scroll down to **Bid Messages** section
2. Select **number** of messages to display in this section
3. Click hyperlink **Document ID** to display requisition details
4. Click hyperlink **Message** to navigate to document in message
5. Select **Select** to select message
6. Click **First** to go to the first message in the queue
7. Click **Previous** to go to the previous page
8. Click **page number** to go to a page number
9. Click **Next** to go to the next page



10. Click **Last** to go to last page

System Messages: Purchase Order Messages

1. Click **System Messages** tab, scroll down to **Purchase Order Messages** section
2. Select **number** of messages to display in this section
3. Click hyperlink **Document ID** to display requisition details
4. Click hyperlink **Message** to navigate to document in message
5. Select **Select** to select message
6. Click **First** to go to the first message in the queue
7. Click **Previous** to go to the previous page
8. Click **page number** to go to a page number
9. Click **Next** to go to the next page
10. Click **Last** to go to last page
11. Click **Cancel & Exit** to exit


Purchase Order Messages
1
Show 5 entries
2
Document ID
Message
Message Type
Date Created
Select
16-AGENCY-12345-P-122
3
Cloned purchase order is 16-AGENCY--P-123
4
New Document Created
12/21/2015 09:47:41 AM
5
0000110
Cloned purchase order is 16-AGENCY-TEST-P-111
New Document Created
11/05/2015 04:33:14 PM
6
First
7
Previous
8
1
9
Next
10
Last
11
Cancel & Exit

Appendix A: Unit of Measure Descriptions

BidBuy UOM	Unit of Measure Description	BidBuy UOM	Unit of Measure Description
ACR	Acre	M	Meter
AU	Activity Unit	MI	Mile
BAG	Bag	ML	Milliliter
BAR	Bar	MM	Millimeter
BT	Bottle	MON	Month
CAN	Canister	PRS	Person
CAR	Carton	OZ	Ounce
CV	Case	PAL	Pallet
CM	Centimeter	%	Percentage
CRT	Crate	PC	Piece
CCM	Cubic centimeter	PT	Pint
FT3	Cubic Foot	QT	Quart
"3	Cubic Inch	S	Second
YD3	Cubic Yard	FT2	Square foot
DAY	Days	"2	Square inch
DZ	Dozen	YD2	Square Yard
DR	Drum	TS	Thousands
EA	Each	GAL	US Gallon
FOZ	Fluid Once	LB	US Pound
FT	Foot	TON	Ton
G	Gram	WK	Week
GRO	Gross	YD	Yard
HR	Hour	YR	Year
"	Inch		
KG	Kilogram		
KM	Kilometer		
L	Liter		

Appendix B: Forms By Process

BidBuy
ILLINOIS ePROCUREMENT

Procurement Document						Procurement Method													
						IFB	RFP	RFI Lse	Emr/ Ext	Sol Sro	St Use	Lse/ Cono	GBS	RFI	Sml	Dem Req	Ord Off Mast	Chg Ord	Rnw
BidBuy Document	Owner	Document Name	Type	Location	Show Y/N	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Requisition	CPO-GS/CMS	Cloud Computing Check Sheet	Attach	https://www.illinois.gov/cpo/general/Documents/20140812%20Open%20Operating%20Standards%20Act%20-%20Cloud%20Checklist%20.pdf	N	X	X		X	X				X	X				
Requisition	CMS	IT Governance	Attach	http://www.illinois.gov/bcc/services/governance/Pages/default.aspx	N	X	X			X									
Requisition	CMS	New Furniture Purchase Form (Surplus Waiver)	Attach	https://oms.partner.illinois.gov/lopr/Forms/Documents/New%20furniture%20purchase%20form.pdf	N	X	X		X	X	X				X		X	X	X
Requisition	CMS	Non-Usage Fleet Request	Form	BidBuy	N	X	X		X	X							X		
Requisition	CMS	Service Procurement and Contracting Checklist	Attach	https://oms.partner.illinois.gov/lopr/Forms/Documents/Labor%20Relations%20Checklist%20March%202014.pdf	N	X	X		X	X	X		X		X		X	X	X
Requisition	PPB	Sole Source Form (part 1)	PPB Doc	http://www.illinois.gov/ppb/Documents/SSJF%20140801%20V5.1%20for%20Dist.docx	Y					X									
Requisition	CMS	Space Req Form	Attach	CMS	N			X											
Requisition	CMS	State Use Committee Approval Form	Attach	CMS	N						X								
Requisition	CMS	Usage Fleet Request	Form	BidBuy	N	X	X		X	X							X		
Bid	CPO-GS	(Solicitation) IFB	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y	X													
Bid	CPO-GS	(Solicitation) P & A	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y		X												
Bid	CPO-GS	(Solicitation) GBS	Attach		Y								X						
Bid	CPO-GS	(Solicitation) RFP	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx/general/SiteAssets/Pages/SolicitationandContractTemplates/RFP%20Template%20V.18.1.docx	Y		X												
Bid	CDB	255 Submittal Form	Attach	http://www.illinois.gov/cdb/business/library/Documents/255%20FORM.pdf	Y								X						
Bid	Agency	Agency Vet Form	Attach	Agency	N	X	X						x						

Bid	CMS	BEP Exemption Decision Memo	Attach	https://oms.partner.illinois.gov/lopr/PR/ProcurementResourcesDocuments/Decision%20Memo_BEP%20Subcontracting.doc	N	X	X						X						
Bid	CMS	BEP Subcontract Goal Setting	Attach	https://oms.partner.illinois.gov/lopr/PR/BEPGoalSetting/NEW%20CMS%20Goal%20Setting%20Worksheet%20revised%2004-14.xlsx	N	X	X						X						
Bid	CPO-GS	BEP Utilization Plan	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y	X	X					X	X						
Bid	CPO-GS	Change Order Justification	Form	BidBuy	N													X	
Bid		Emergency Affidavit	Attach		Y				X										
Bid	CPO-GS	Emergency Extension Justification/Hearing Notice	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y				X										
Bid	CPO-GS	Forms A	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y	X	X		X	X	X	X	X		X			X	X
Bid	CPO-GS	Forms B	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y	X	X		X	X	X	X	X		X			X	X
Bid	CPO-GS	ICI Waiver	Form	BidBuy	N	X	X			X					X				
Bid	CPO-GS	Letter of Intent BEP - CMS	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X	X						X			X			
Bid	CPO-GS	Notice of Award/Justification	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y	X	X					X	X		X				X
Bid	CPO-GS	QBS Rank Order Form	Form	BidBuy	Y								X						
Bid	PPB	Renewal Questions for over $250,000 (PPB) Form	Attach	http://www.illinois.gov/ppb/Documents/ExtOrRen250_110810.pdf	Y														X
Bid	CPO-GS	Small Business Set Aside Waiver	Form	BidBuy	N	X	X		X	X	X	X			X	X			
Bid	PPB	Sole Source Form (part 2)	PPB Doc	http://www.illinois.gov/ppb/Documents/SSJF%20140301%20V5.1%20for%20Dist.docx	Y					X									
Bid	CPO-GS	Sole Source Hearing Notification	Attach		Y					X									
Bid	CPO-GS	Standard Certifications (Terms and Conditions)	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y	X	X		X	X	X	X	X		X				
Bid	Agency	Supplemental Terms and Conditions	Attach	Agency	Y	X	X		X	X	X	X	X		X				X

Bid Tabulation & Award	CMS	BEP Waiver (If needed due to good faith effort)	Attach		N	X	X						X						
Bid Tabulation & Award	CPO-GS	Non-Responsive Vendor Determination	Form	BidBuy	N	X	X					X	X		X				
Bid Tabulation & Award	CPO-GS	Procurement File Checklist	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X	X												X
Bid Tabulation & Award	CPO-GS	Procurement File Checklist - Emergency	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N				X										
Bid Tabulation & Award	CPO-GS	Procurement File Checklist - Order Against Master	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N												X		
Bid Tabulation & Award	CPO-GS	Procurement File Checklist - Small Purchase	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N										X				
Bid Tabulation & Award	CPO-GS	Procurement File Checklist - Sole Source	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N					X									
Bid Tabulation & Award	CPO-GS	Procurement File Checklist - Solicitations	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N	x	x					x	x			x			
Bid Tabulation & Award	CPO-GS	Procurement File Checklist - State Use	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N						X								
Bid Tabulation & Award	CPO-GS	Responsiveness Review Checklists - IFB	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X													
Bid Tabulation & Award	CPO-GS	Responsiveness Review Checklists - RFP	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N		X												
Bid Tabulation & Award	CPO-GS	Scoring Justification	Attach		N		x			X			X						
Purchase Order	CPO-GS	BOA Orders Against Master	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx/general/Pages/DoingBusinesswithStateAgencies.aspx	N												X		
Purchase Order	CPO-GS	BOA Over 50,000	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X	X		X	X	X	X	X		X	X			
Purchase Order	CPO-GS	BOA Under 50,000	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N										X				
Purchase Order	CPO-GS	Continuing Disclosure - Change	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N													X	X
Purchase Order	CPO-GS	Continuing Disclosure - No Change	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N													X	X
Purchase Order	CPO-GS	Contract Renewal	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N														X

Purchase Order	CPO-GS	Emergency Extension Hearing Determination	Attach	http://www.illinois.gov/opc/general/Pages/DoingBusinesswithStateAgencies.aspx	Y				X										
Purchase Order	Agency	3-Signature Form	Attach	Agency	N	X	X		X	X	X		X			X	X	X	X
Purchase Order	CPO-GS	Financial Disclosures & Conflict Of Interest	Attach	http://www.illinois.gov/opc/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X	X		X	X	X	X	X		X		X	X	X
Purchase Order	DOL	Prevailing Wage Certificate	Attach	http://www.illinois.gov/idol/forms/Documents/Prevailing%20Wage%20Certification%20Form.pdf	N	X	X	X	X	X		X	X	X				X	X
Purchase Order	CPO-GS	Stand Alone Contract	Attach	http://www.illinois.gov/opc/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X	X	X	X	X	X	X	X		X				X
Purchase Order	CPO-GS	Standard Amendment to Vendor Form	Attach	http://www.illinois.gov/opc/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X	X	X	X	X	X	X	X	X	X	X	X	X	X

Appendix C: Custom Columns

Appendix C - Custom Columns

Requisition

Column Label*	Column Description	Document Tab
Agency Reference Number	Used for reporting/tracking; enter any applicable Agency-generated reference number	General
Special Procurement Type: If any yes, please complete and attach the applicable Form or Attachment	Select as applicable	General
Link to Original Contract	Allows user to establish a hyperlink to another BidBuy document using an Advanced Search feature	General
Skip Transaction (If yes, transaction is NOT sent to AIS)	AIS Agencies Only	General
Additional NIGP Code	Use to identify additional codes for the BP user to notify vendors on the Bid of the opportunity	Items
Will Federal Funds be used?	Select 'Yes' if Federal Funds will be used	Accounting
If yes, please provide the CFDA#.	Appears when 'Will Fed Funds be used?' is marked 'Yes'	Accounting
Will a Grant Funding Source be used?	Select 'Yes' if Grant Funding will be used	Accounting

BID

SPO Name	Enter SPO name	Bid
Agency Reference Number	Used for reporting/tracking; enter any applicable Agency-generated reference number	Bid
Special Procurement Rationale	Select as applicable	Bid

Emergency Rationale	Appears when 'Special Procurement Rationale' is set to 'Emergency'. Enter narrative to provide justification for using this special procurement method	Bid
Sole Source Rationale	Appears when 'Special Procurement Rationale' is set to 'Sole Source'. Enter narrative to provide justification for using this special procurement method	Bid
Has the approved State Use Request Form and Authorization Letter been attached?	Appears when 'Special Procurement Rationale' is set to 'State Use'. Indicate whether applicable files/forms have been attached	Bid
Brand Name	Used for reporting/tracking; mark whether specifications require a Brand Name item or service	Bid
Is this subject to Small Business Set Aside?	Used for reporting/tracking; mark whether this procurement meets the definition of one of the 673 mandated NIGP Code categories and/or dollar threshold that requires soliciting from qualified, registered SBSP vendors	Bid
Are you utilizing an active, registered Small Business Set Aside Vendor?	Appears when 'Is this subject to Small Busines Set Aside?' is marked 'Yes'. Indicate whether a registered SBSP vendor will be solicited	Bid
Did you complete and attach the Small Business Set Aside Waiver form?	Appears when 'Are you utilizing an active, registered Small Business Set Aside Vendor?' is marked 'No'. Indicate whether a Small Business Set Aside Waiver has been completed and attached.	Bid
Potential BEP/VBP Participation Goal? Only if estimated amount is >/= $250,000	Used for tracking/reporting purposes; mark whether specifications include BEP/VBP participation goals	Bid
Link to Original Contract (for a Renewal or Change Order)	Allows user to establish a hyperlink to another BidBuy document using an Advanced Search feature	Bid
Original Bid Number (for a Renewal or Change Order)	Allows user to identify an original Bid Number, as applicable	Bid
Original Reference Bid Post Date (for a Renewal or Change Order)	Allows user to identify the date the original Bid was posted, as applicable	Bid
Additional NIGP Code	Use to identify additional codes for the BP user to notify vendors on the Bid of the opportunity	Bid
Will Federal Funds be used?	Select 'Yes' if Federal Funds will be used	Bid

If yes, please provide the CFDA#.	Appears when 'Will Fed Funds be used?' is marked 'Yes'	Bid
Will a Grant Funding Source be used?	Select 'Yes' if Grant Funding will be used	Bid

Purchase Order

Agency Reference Number	Used for reporting/tracking; enter any applicable Agency-generated reference number	General
Original Contract No.	Needed for novation and assignments. This custom column is required anytime the original contract no. is needed. (SAMS or AIS)	General
Bulletin Reference Number		General
Publication Date		General
Special Procurement Type	Select as applicable	General
Emergency Affidavit Date		General
Is this subject to Small Business Set Aside?	Used for reporting/tracking; mark whether this procurement meets the definition of one of the 673 mandated NIGP Code categories and/or dollar threshold that requires soliciting from qualified, registered SBSP vendors	General
Are you utilizing an active, registered Small Business Set Aside Vendor?	Appears when 'Is this subject to Small Busines Set Aside?' is marked 'Yes'. Indicate whether a registered SBSP vendor will be solicited	General
Did you complete and attach the Small Business Set Aside Waiver form?	Appears when 'Are you utilizing an active, registered Small Business Set Aside Vendor?' is marked 'No'. Indicate whether a Small Business Set Aside Waiver has been completed and attached.	General
Are there any items on this PO on the current CPO Approved ICI List?		General
Has the ICI Preference Waiver been attached?		General
Actual Contract Begin Date		General
Actual Contract End Date		General
Date Contract Executed	n/a	General

Number of Renewals (number of times you can renew)	n/a	General
Number of Renewal Terms (number of units in one renewal)	n/a	General
Renewal Term Units (renewal indicator; ex months, years, etc)	n/a	General
Next Renewal Start Date		General
Fiscal Year of Obligation	n/a	General
Transaction Code-Prefix (first 2 digits)	AIS Agencies Only	General
Transaction Code-Suffix (last 2 digits)	AIS Agencies Only	General
Master Contract?		General
Master Contract?	AIS Agencies Only	General
Subcontractor Utilization		General
Skip Transaction (If yes, transaction is not sent to AIS)	AIS Agencies Only	General
Original Contract No (Novation/Assignment only)	n/a	General
Subcontractor Disclosed?		General
Travel Indicator		General
Travel Amount		General
Fixed Price?		General
Advance Payment?		General
Incoterm Key		General
Usage % Alert	Please enter the whole percentage, such as 10 for 10%, in which you would like to receive an alert regarding the usage of this contract.	General
Validity Alert (Days)	To receive an alert regarding the number of remaining contract days, please enter a whole number days.	General
Additional NIGP Code	Use to identify additional codes for the BP user to notify vendors on the Bid of the opportunity	Items

Fixed/Variable	AIS Agencies Only	Item
SAP Material Master Number	n/a	Item
Will Federal Funds be used?	Select 'Yes' if Federal Funds will be used	Accounting
If yes, please provide the CFDA#.	Appears when 'Will Fed Funds be used?' is marked 'Yes'	Accounting
Will a Grant Funding Source be used?	Select 'Yes' if Grant Funding will be used	Accounting

Periscope
HOLDINGS INC

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