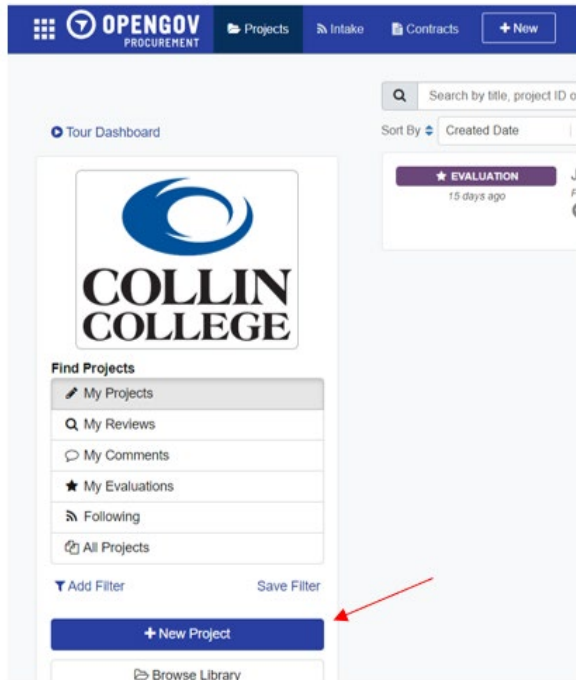


Creating A New Intake Request.....	1
Viewing & Editing Intake Form Requests	8
Intake Form For Rebid – One Stakeholder.....	9
Intake Form For Rebid – Multiple Stakeholders	13
Intake Form For Renewal – One Stakeholder	17
Intake Form For Renewal - Multiple Stakeholders.....	20
Create, View & Respond To Comments.....	22

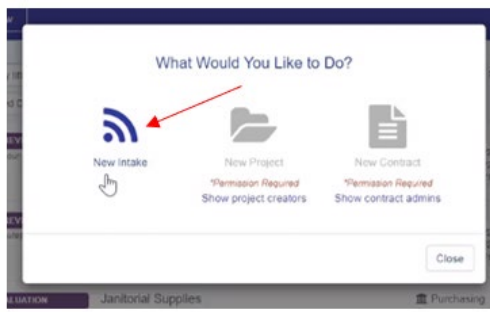
|

CREATING A NEW INTAKE REQUEST

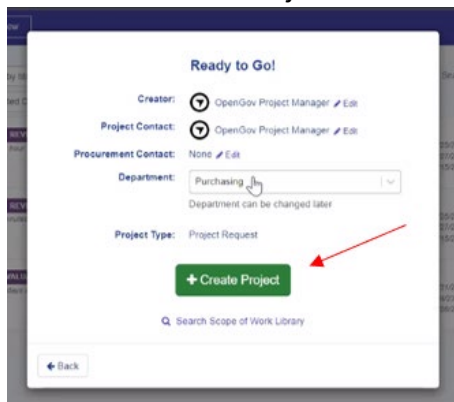
1. Click on + New Project.



2. Click on New Intake.



3. Click on + Create Project.



4. In the Title Project field, enter the title for the project.

In the Project Contact field, Project Contact – Enter the name of the person requesting the project if entering for someone else.

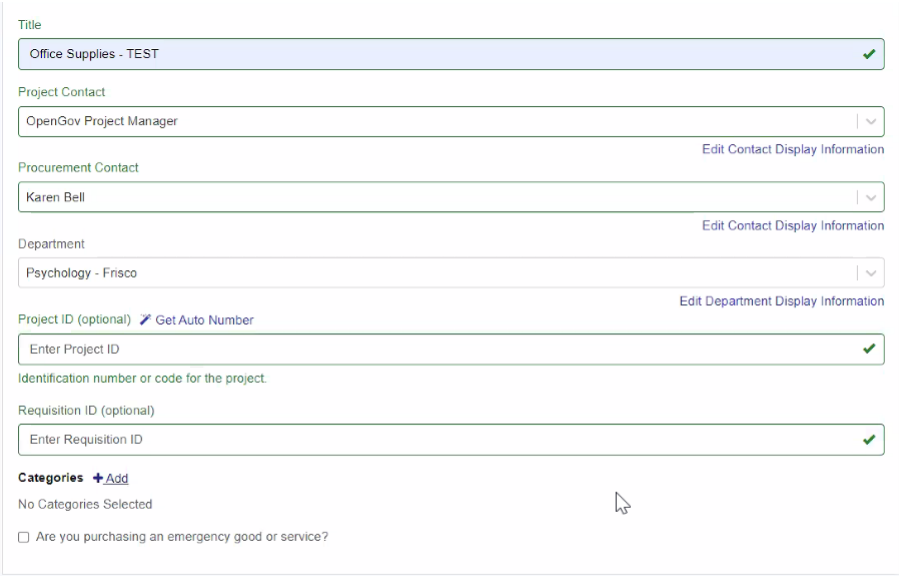
Procurement Contact –Ensure the Procurement Contact auto-populated. If this is for a review of an agreement or contract, change the Procurement Contact to **Kathy Brown**.

Project ID – **DO NOT USE**

Requisition ID (optional) – Enter requisition number from Workday if available.

Categories – Click on add and chose the categories that apply to the project.

Click Next to proceed to the Document Setup Section.



The screenshot shows a web form for creating a new intake request. The fields are as follows:

- Title:** Office Supplies - TEST (with a green checkmark)
- Project Contact:** OpenGov Project Manager (dropdown menu)
- Procurement Contact:** Karen Bell (dropdown menu)
- Department:** Psychology - Frisco (dropdown menu)
- Project ID (optional):** Enter Project ID (with a green checkmark)
- Requisition ID (optional):** Enter Requisition ID (with a green checkmark)
- Categories:** +Add (button), No Categories Selected (text)
- Are you purchasing an emergency good or service?

At the bottom right of the form is a green button labeled "Next >".

5. Answer the questions in the Document Setup section. Question 2 has the following instructions:

- If this is for a solicitation, all questions below must be answered or the intake form will be returned. See the Procurement Planning and Yearly Purchasing Training document in the Internal Only Documents section for purchasing guidelines and procedures.
- If this is for review of an agreement/contract set Kathy Brown as the procurement contact in the Project Information section. You can skip these questions and attach your document in the INTERNAL ONLY DOCUMENTS. See the Legal Review of Contracts, Review and Signature Authority, and Standard Addendum to Agreement documents in the Internal Only Document sections for instructions on submitting an agreement/contract for review. **IF THIS AGREEMENT/CONTRACT WILL REQUIRE A PURCHASE ORDER, DELETE THIS FORM AND ATTACH THE AGREEMENT TO YOUR REQUISITION.**

Click Next to proceed to the Introduction Section.

Document Setup

Provide the information below to configure your document

1. What is the purpose of this request?*

Solicitation (Invitation to Bid, Request for Proposals, Request for Quotes, Request for Qualifications)

Review of Agreement/Contract by Contract Administrator

2. Solicitation (Invitation to Bid, Request for Proposals, Request for Quotes, Request for Qualifications)

If this is for a solicitation, all questions below must be answered or the intake form will be returned. See the Procurement Planning and Yearly Purchasing Training document in the Internal Only Documents section for purchasing guidelines and procedures.

If this is for review of an agreement/contract set Kathy Brown as the procurement contract in the Project Information section. You can skip these questions and attach your document in the INTERNAL ONLY DOCUMENTS. See the Legal Review of Contracts, Review and Signature Authority, and Standard Addendum to Agreement documents in the Internal Only Document sections for instructions on submitting an agreement/contract for review. IF THIS AGREEMENT/CONTRACT WILL REQUIRE A PURCHASE ORDER, DELETE THIS FORM AND ATTACH THE AGREEMENT TO YOUR REQUISITION.

2.1. Is this project a new solicitation or one we have issued before?

New Solicitation

Solicitation Previously Issued

2.2. Have you checked with the Purchasing Department to see if a current contract is available?

Yes

No

- In the Summary field, give a brief description of the project being requested or agreement being reviewed. The Summary field must have information in it in order to submit the project request. Click Next to proceed to the Scope of Work Section.

Summary

Improving Streets

Write a summary. Keep it short and snappy. Limit it to 1 to 3 paragraphs

Background (optional)

Enter Text (optional)

Add some background info. This is optional - Just leave it blank if you don't need it

- In the Scope Of Work field, list the requirements for this project or attach a scope of work. Steps 8-12 show you how to add a scope from the library. These steps are not required if the library is not being utilized. If you do not have a scope of work, you can search the Project Library for suggestions for scope of work that were used at other entities.

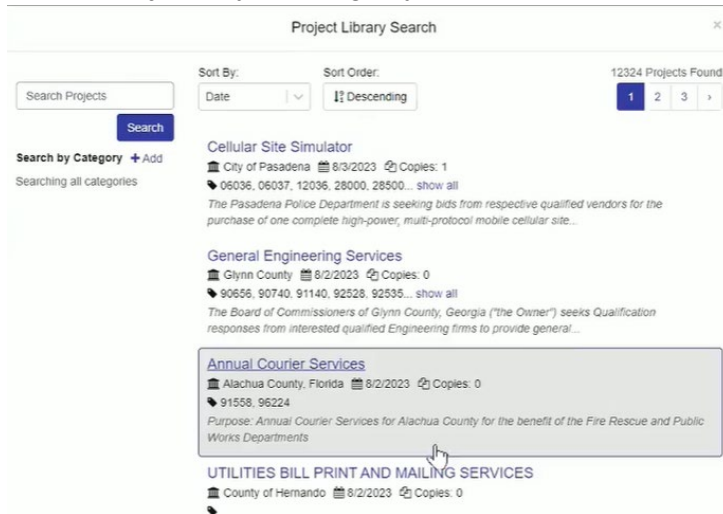
Scope of work resources: [Scope of Work Library](#) [Suggested Content](#) [Partner Resources](#)

Define the requirements for this project request

Scope of Work

Enter the Scope of Work here or Attach it in the bottom

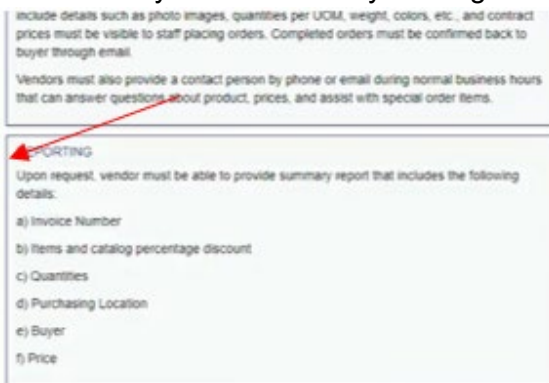
8. Search projects by entering keywords and then click on the scope of work you would like to view.



The screenshot shows the 'Project Library Search' interface. At the top, it says '12324 Projects Found'. There are search filters for 'Search Projects', 'Sort By: Date', and 'Sort Order: Descending'. A 'Search' button is visible. Below the filters, there are three project listings:

- Cellular Site Simulator**
City of Pasadena | 8/3/2023 | Copies: 1
06036, 06037, 12036, 28000, 28500... show all
The Pasadena Police Department is seeking bids from respective qualified vendors for the purchase of one complete high-power, multi-protocol mobile cellular site...
- General Engineering Services**
Glynn County | 8/2/2023 | Copies: 0
90556, 90740, 91140, 92528, 92535... show all
The Board of Commissioners of Glynn County, Georgia ("the Owner") seeks Qualification responses from interested qualified Engineering firms to provide general...
- Annual Courier Services** (highlighted with a red box)
Alachua County, Florida | 8/2/2023 | Copies: 0
91558, 96224
Purpose: Annual Courier Services for Alachua County for the benefit of the Fire Rescue and Public Works Departments
- UTILITIES BILL PRINT AND MAILING SERVICES**
County of Hernando | 8/2/2023 | Copies: 0

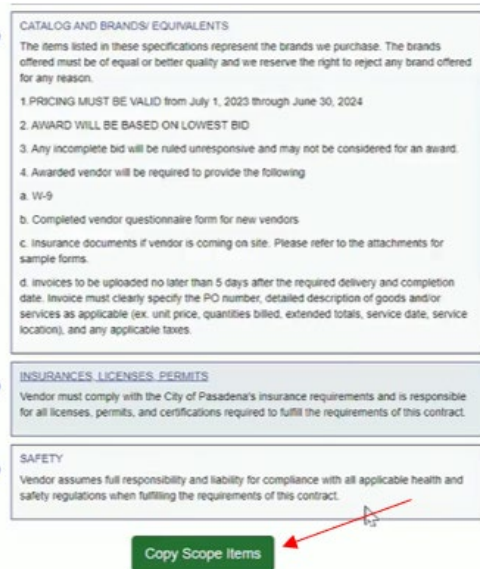
9. Select all or only certain items by clicking on each item.



The screenshot shows a list of items with checkboxes for selection. A red arrow points to the 'REPORTING' item, which is selected. The 'REPORTING' item details are as follows:

- REPORTING**
- Upon request, vendor must be able to provide summary report that includes the following details:
 - Invoice Number
 - Items and catalog percentage discount
 - Quantities
 - Purchasing Location
 - Buyer
 - Price

10. Once all items are selected, click Copy Scope Items.

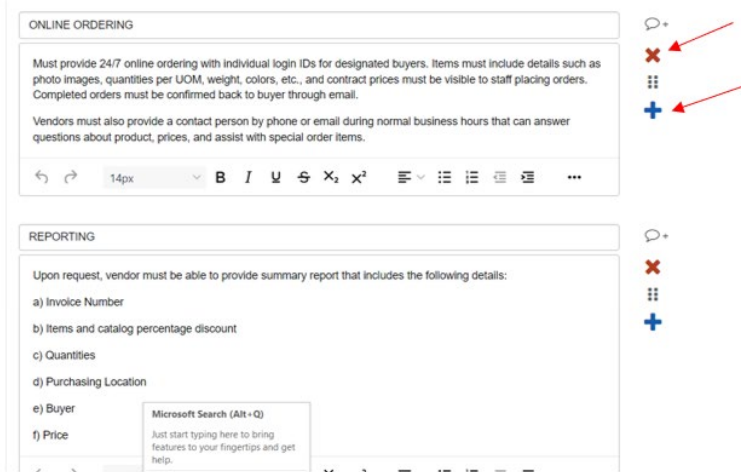


The screenshot shows three sections of a contract template, each with a checked selection box:

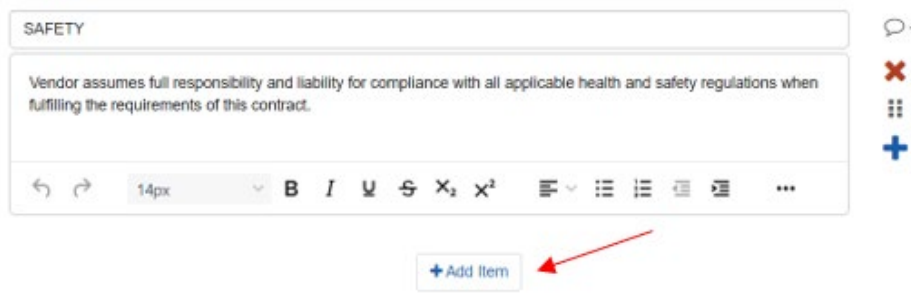
- CATALOG AND BRANDS/ EQUIVALENTS**
The items listed in these specifications represent the brands we purchase. The brands offered must be of equal or better quality and we reserve the right to reject any brand offered for any reason.
1. PRICING MUST BE VALID from July 1, 2023 through June 30, 2024
2. AWARD WILL BE BASED ON LOWEST BID
3. Any incomplete bid will be ruled unresponsive and may not be considered for an award.
4. Awarded vendor will be required to provide the following:
a. W-9
b. Completed vendor questionnaire form for new vendors
c. Insurance documents if vendor is coming on site. Please refer to the attachments for sample forms.
d. Invoices to be uploaded no later than 5 days after the required delivery and completion date. Invoice must clearly specify the PO number, detailed description of goods and/or services as applicable (ex. unit price, quantities billed, extended totals, service date, service location), and any applicable taxes.
- INSURANCES, LICENSES, PERMITS**
Vendor must comply with the City of Pasadena's insurance requirements and is responsible for all licenses, permits, and certifications required to fulfill the requirements of this contract.
- SAFETY**
Vendor assumes full responsibility and liability for compliance with all applicable health and safety regulations when fulfilling the requirements of this contract.

At the bottom, a green button labeled 'Copy Scope Items' is highlighted with a red arrow.

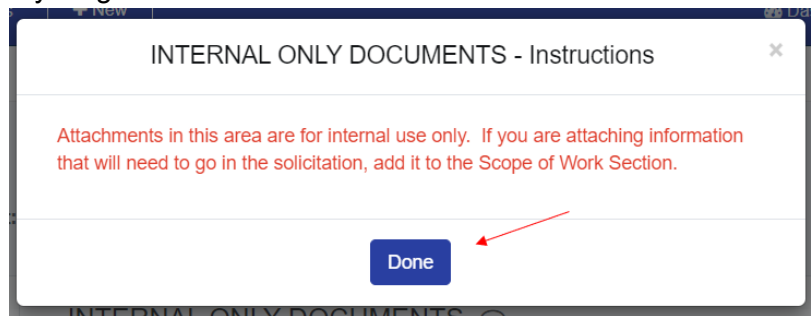
11. Once the items are listed in your project, the items can be edited to add or delete information as required. Click in the field and delete or add text. If a section should be removed, click on the **X**. To add an additional section below a section, click on the **+**.



12. Add a section at the bottom by clicking + Add Item.



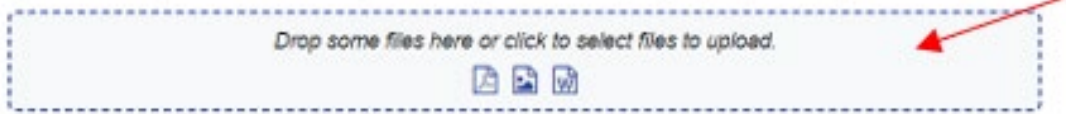
13. Review all information entered in the sections to make sure the information is accurate.
14. The following instructions will be displayed for the Internal Only Documents section. Do not attach anything in this section that needs to be attached to the solicitation. Click done to proceed.



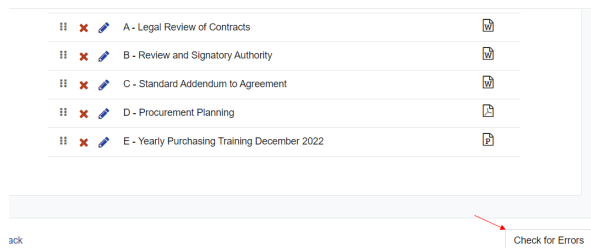
Attachments in this area are for internal use only. If you are attaching information that will need to go in the solicitation, add it to the Scope of Work Section.

15. To attach documents, drop files or add files by clicking the blue Drop some files here or click to select files to upload. Attach any documents here that will need to be attached in the solicitation. Click next to proceed to the Internal Only Documents Section.

Upload a file or spreadsheet containing detailed requirements for your project (if needed)



16. Once all steps are completed, click Check for Errors.



17. Return to any section that is not marked with a green check.

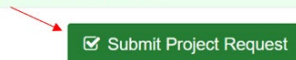
Project Request Sections Checklist

Project Information	
Document Setup	
Introduction	
Scope of Work	
INTERNAL ONLY DOCUMENTS	

18. Once all sections are marked completed, click Submit Project Request to start the review and approval process.

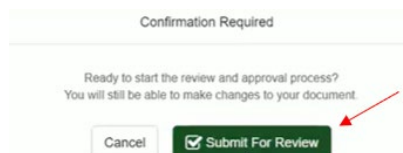
Project Request Sections Checklist

Project Information	
Document Setup	
Introduction	
Scope of Work	
INTERNAL ONLY DOCUMENTS	

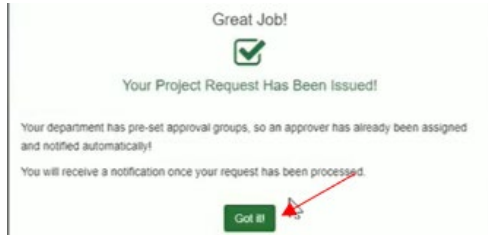


Great job, all the sections have been successfully completed!
Click the button above to start the review and approval process.

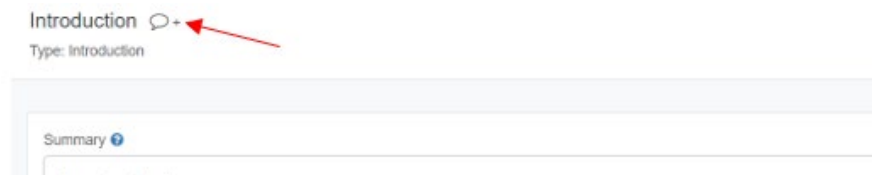
19. Click Submit For Review.



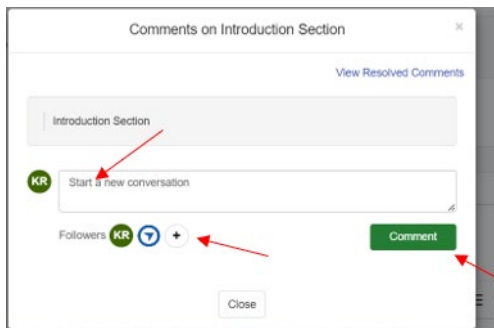
20. Your project has been submitted for review. Click Got it!



21. To add a comment for the Buyer, click on the Chat sign located in different sections of the project.



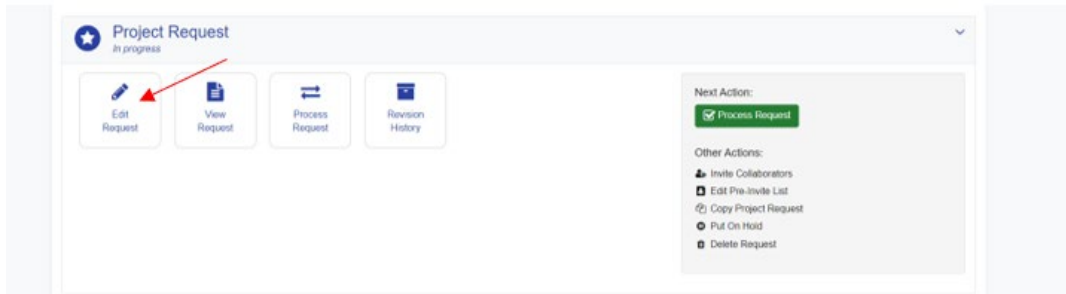
22. Tag the Buyer by clicking the plus sign + and select their name. Enter the comment in the Start a New Conversation field. Click Comment.



VIEWING & EDITING INTAKE FORM REQUESTS

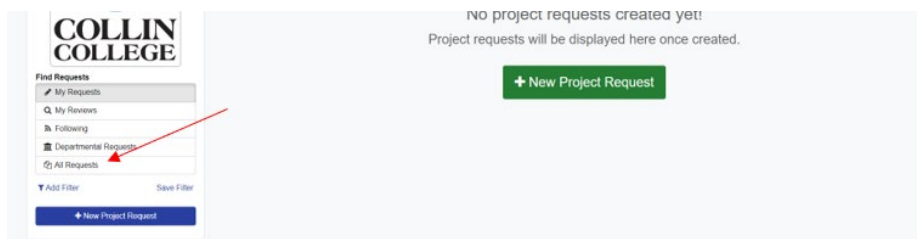
When clicking on the link received through email, the link will take the user straight to the request for viewing.

1. Once opened, click Edit Request.

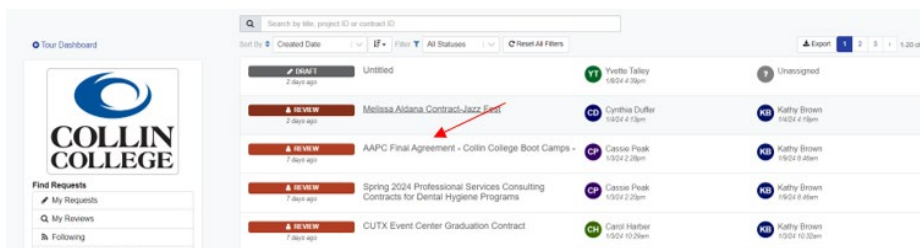


If you are logged into OpenGov:

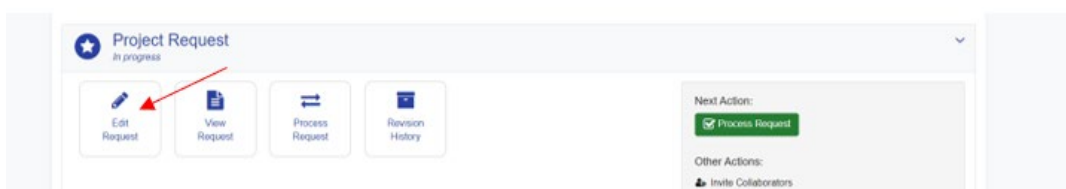
1. To see all requests you have been invited to click on All Request.



2. Click on the title of the intake form you want to open.



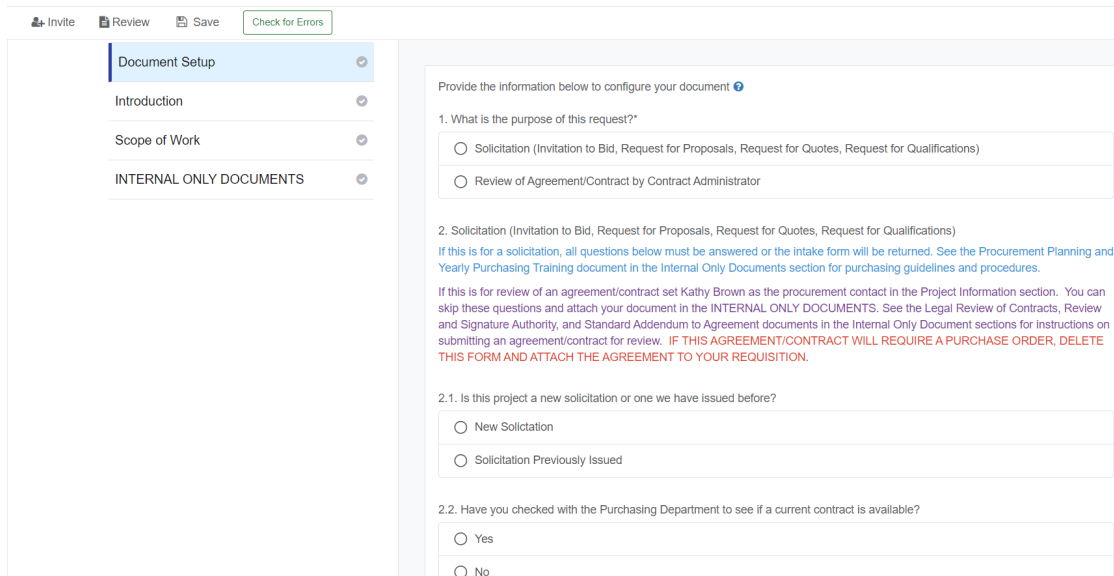
3. Once opened, click Edit Request.



INTAKE FORM FOR REBID – ONE STAKEHOLDER

You will receive a notification when you are invited to view an intake form for a contract that is due to be rebid. The Project Information section will have the information entered prior to receiving the notification.

1. Click on the Document Setup Section on the left side of the screen. Answer the questions that populate. Once completed, click Next to proceed to the Introduction Section.



Invite Review Save Check for Errors

Document Setup Introduction Scope of Work INTERNAL ONLY DOCUMENTS

Provide the information below to configure your document

1. What is the purpose of this request?

Solicitation (Invitation to Bid, Request for Proposals, Request for Quotes, Request for Qualifications)

Review of Agreement/Contract by Contract Administrator

2. Solicitation (Invitation to Bid, Request for Proposals, Request for Quotes, Request for Qualifications)

If this is for a solicitation, all questions below must be answered or the intake form will be returned. See the Procurement Planning and Yearly Purchasing Training document in the Internal Only Documents section for purchasing guidelines and procedures.

If this is for review of an agreement/contract set Kathy Brown as the procurement contact in the Project Information section. You can skip these questions and attach your document in the INTERNAL ONLY DOCUMENTS. See the Legal Review of Contracts, Review and Signature Authority, and Standard Addendum to Agreement documents in the Internal Only Document sections for instructions on submitting an agreement/contract for review. **IF THIS AGREEMENT/CONTRACT WILL REQUIRE A PURCHASE ORDER, DELETE THIS FORM AND ATTACH THE AGREEMENT TO YOUR REQUISITION.**

2.1. Is this project a new solicitation or one we have issued before?

New Solicitation

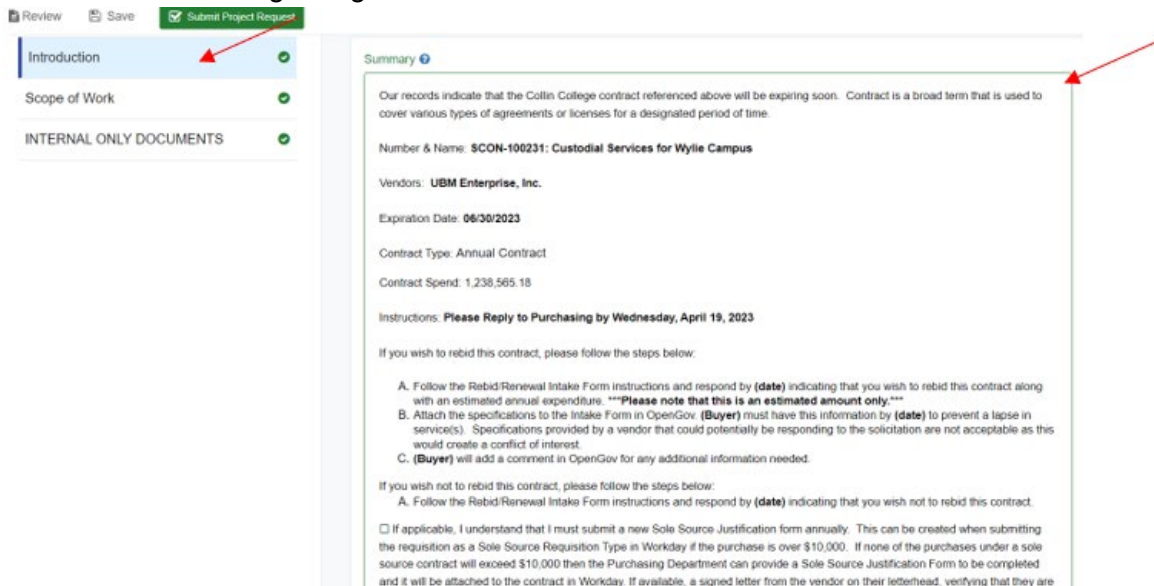
Solicitation Previously Issued

2.2. Have you checked with the Purchasing Department to see if a current contract is available?

Yes

No

2. The Introduction Section will have information completed for review. The Summary section will have detailed information regarding the contract that is due to be rebid.



Review Save Submit Project Request

Introduction Scope of Work INTERNAL ONLY DOCUMENTS

Summary

Our records indicate that the Collin College contract referenced above will be expiring soon. Contract is a broad term that is used to cover various types of agreements or licenses for a designated period of time.

Number & Name: **SCON-100231: Custodial Services for Wylie Campus**

Vendors: **UBM Enterprise, Inc.**

Expiration Date: **06/30/2023**

Contract Type: Annual Contract

Contract Spend: 1,238,565.18

Instructions: **Please Reply to Purchasing by Wednesday, April 19, 2023**

If you wish to rebid this contract, please follow the steps below:

A. Follow the Rebid/Renewal Intake Form instructions and respond by **(date)** indicating that you wish to rebid this contract along with an estimated annual expenditure. *****Please note that this is an estimated amount only.*****

B. Attach the specifications to the Intake Form in OpenGov. **(Buyer)** must have this information by **(date)** to prevent a lapse in service(s). Specifications provided by a vendor that could potentially be responding to the solicitation are not acceptable as this would create a conflict of interest.

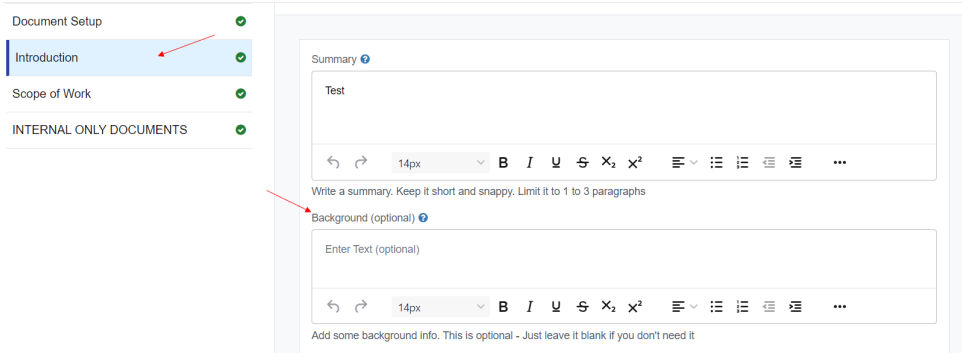
C. **(Buyer)** will add a comment in OpenGov for any additional information needed.

If you wish not to rebid this contract, please follow the steps below:

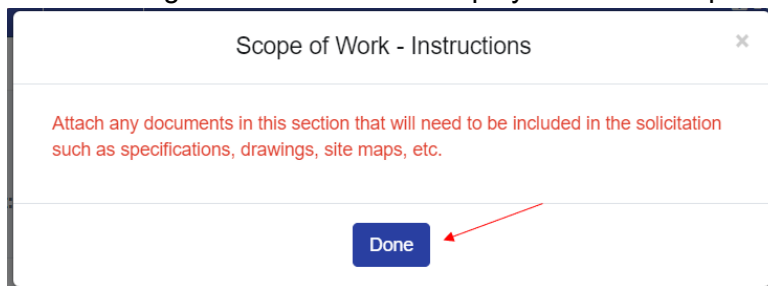
A. Follow the Rebid/Renewal Intake Form instructions and respond by **(date)** indicating that you wish not to rebid this contract.

If applicable, I understand that I must submit a new Sole Source Justification form annually. This can be created when submitting the requisition as a Sole Source Requisition Type in Workday if the purchase is over \$10,000. If none of the purchases under a sole source contract will exceed \$10,000 then the Purchasing Department can provide a Sole Source Justification Form to be completed and it will be attached to the contract in Workday. If available, a signed letter from the vendor on their letterhead, verifying that they are

- Enter the estimated spend in the Background section. If the contract is no longer required, enter a comment indicating that you wish not to rebid the contract. Click Next to proceed to the Scope of Work section.



- The following instructions will be displayed for the Scope of Work section. Click done to proceed.

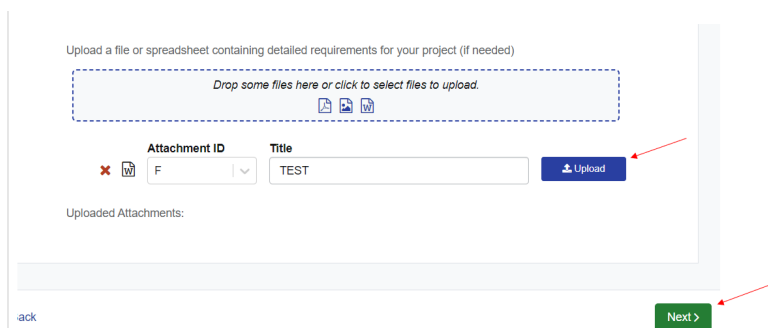


The buyer will have uploaded the specifications used previously here for each stakeholder to review and edit as needed.

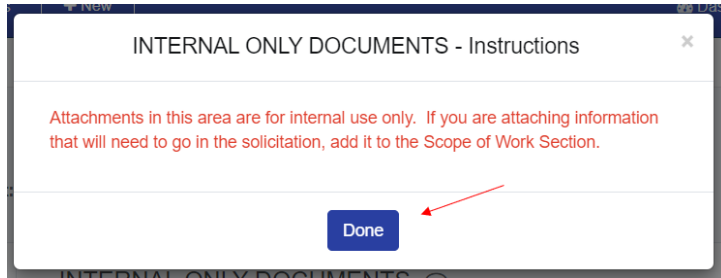
- To attach documents, drop files or add files by clicking the blue Drop some files here or click to select files to upload. Attach any documents here that will need to be attached in the solicitation.



- Click Upload. Once all documents are uploaded, click Next to proceed to the Internal Only Documents.



7. The following instructions will be displayed for the Internal Only Documents section. Do not attach anything in this section that needs to be attached to the solicitation. Click done to proceed.



Attachments in this area are for internal use only. If you are attaching information that will need to go in the solicitation, add it to the Scope of Work Section.

8. To attach documents in the Project Request Documents, drop files or add files by clicking the blue Drop some files here or click to select files to upload. Attach any documents here that will need to be attached in the solicitation. Click next to proceed to the Internal Only Documents Section.

Upload a file or spreadsheet containing detailed requirements for your project (if needed)



9. Click Upload.

Upload a file or spreadsheet containing detailed requirements for your project (if needed)

Drop some files here or click to select files to upload.

Attachment ID	Title	
F	TEST	Upload









Uploaded Attachments:

10. Once all documents are uploaded, scroll to the bottom, and click Check for Errors.

A - Legal Review of Contracts	
B - Review and Signatory Authority	
C - Standard Addendum to Agreement	
D - Procurement Planning	
E - Yearly Purchasing Training December 2022	

11. Return to any section that is not marked with a green check.

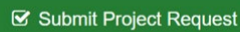
Project Request Sections Checklist

Project Information 	
Document Setup 	
Introduction 	
Scope of Work	
INTERNAL ONLY DOCUMENTS	

12. Once all sections are marked completed, click Submit Project Request to start the review and approval process.

Project Request Sections Checklist

Project Information	
Document Setup	
Introduction	
Scope of Work	
INTERNAL ONLY DOCUMENTS	



Great job, all the sections have been successfully completed!
Click the button above to start the review and approval process.


13. Click Submit For Review.

Confirmation Required

Ready to start the review and approval process?
You will still be able to make changes to your document.

14. Your project has been submitted for review. Click Got it!

Great Job!



Your Project Request Has Been Issued!

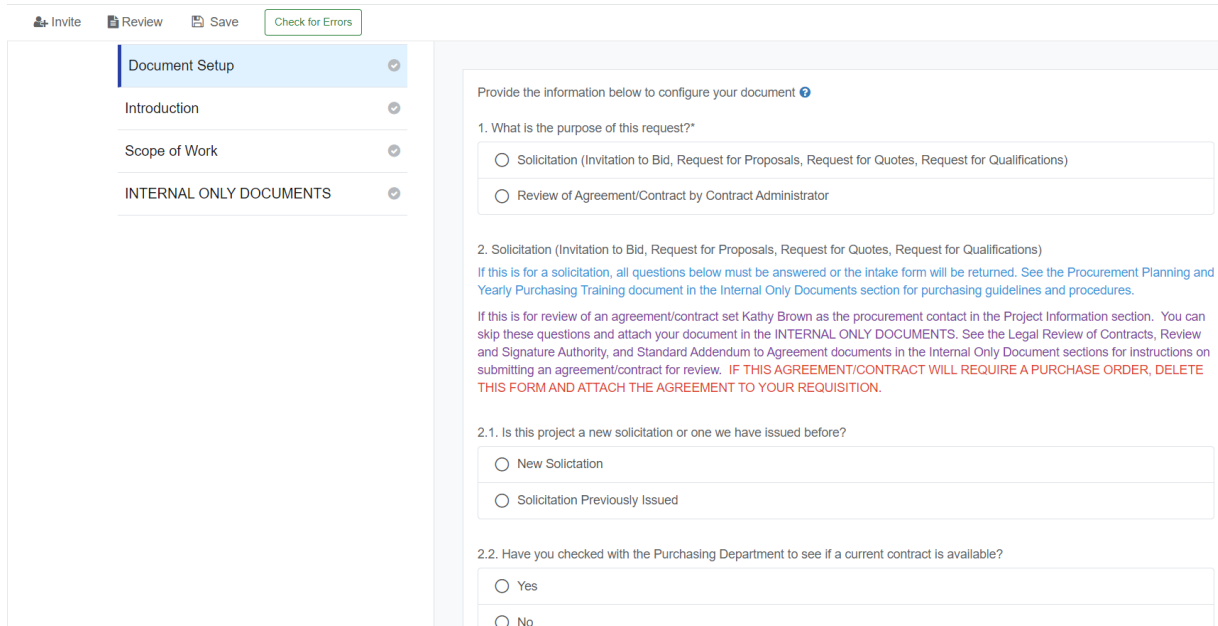
Your department has pre-set approval groups, so an approver has already been assigned and notified automatically!

You will receive a notification once your request has been processed.

INTAKE FORM FOR REBID – MULTIPLE STAKEHOLDERS

You will receive a notification when you are invited to view an intake form for a contract that is due to be rebid. The Project Information section will have the information entered prior to receiving the notification.

1. Click on the Document Setup Section on the left side of the screen. Answer the questions that populate. Once completed, click Next to proceed to the Introduction Section.



Invite Review Save Check for Errors

Document Setup Introduction Scope of Work INTERNAL ONLY DOCUMENTS

Provide the information below to configure your document

1. What is the purpose of this request?*

Solicitation (Invitation to Bid, Request for Proposals, Request for Quotes, Request for Qualifications)

Review of Agreement/Contract by Contract Administrator

2. Solicitation (Invitation to Bid, Request for Proposals, Request for Quotes, Request for Qualifications)

If this is for a solicitation, all questions below must be answered or the intake form will be returned. See the Procurement Planning and Yearly Purchasing Training document in the Internal Only Documents section for purchasing guidelines and procedures.

If this is for review of an agreement/contract set Kathy Brown as the procurement contact in the Project Information section. You can skip these questions and attach your document in the INTERNAL ONLY DOCUMENTS. See the Legal Review of Contracts, Review and Signature Authority, and Standard Addendum to Agreement documents in the Internal Only Document sections for instructions on submitting an agreement/contract for review. **IF THIS AGREEMENT/CONTRACT WILL REQUIRE A PURCHASE ORDER, DELETE THIS FORM AND ATTACH THE AGREEMENT TO YOUR REQUISITION.**

2.1. Is this project a new solicitation or one we have issued before?

New Solicitation

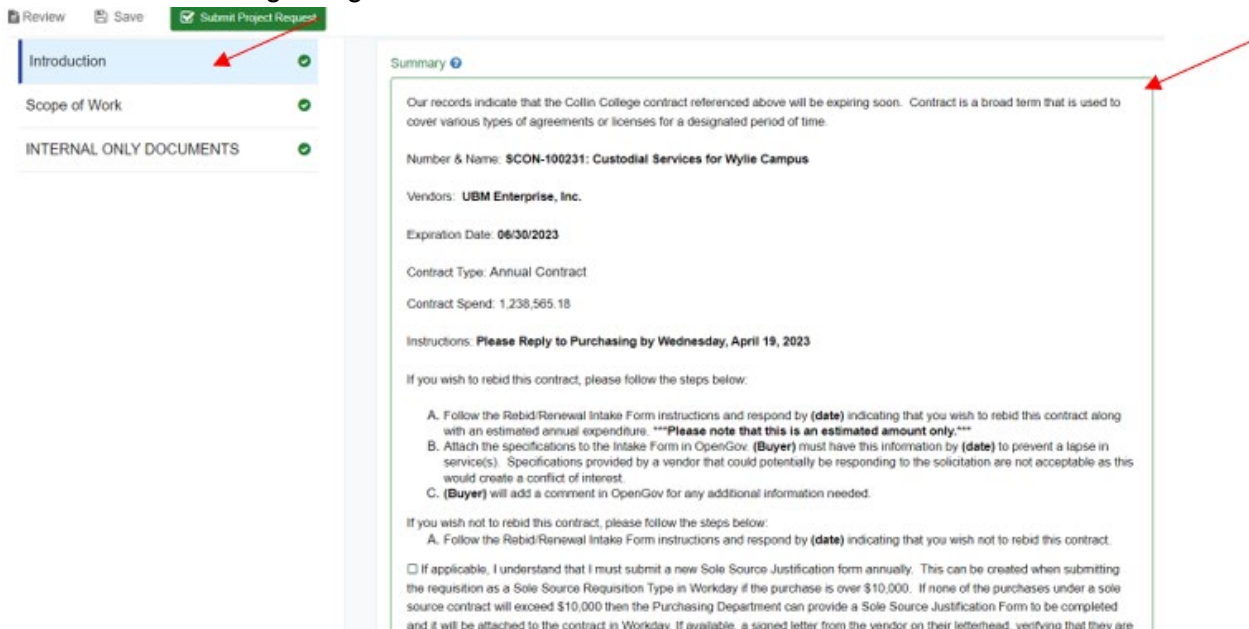
Solicitation Previously Issued

2.2. Have you checked with the Purchasing Department to see if a current contract is available?

Yes

No

2. The Introduction Section will have information completed for review. The Summary section will have detailed information regarding the contract that is due to be rebid.



Review Save Submit Project Request

Introduction Scope of Work INTERNAL ONLY DOCUMENTS

Summary

Our records indicate that the Collin College contract referenced above will be expiring soon. Contract is a broad term that is used to cover various types of agreements or licenses for a designated period of time.

Number & Name: **SCON-100231: Custodial Services for Wylie Campus**

Vendors: **UBM Enterprise, Inc.**

Expiration Date: **06/30/2023**

Contract Type: Annual Contract

Contract Spend: 1,238,565.18

Instructions: **Please Reply to Purchasing by Wednesday, April 19, 2023**

If you wish to rebid this contract, please follow the steps below:

A. Follow the Rebid/Renewal Intake Form instructions and respond by **(date)** indicating that you wish to rebid this contract along with an estimated annual expenditure. *****Please note that this is an estimated amount only.*****

B. Attach the specifications to the Intake Form in OpenGov. **(Buyer)** must have this information by **(date)** to prevent a lapse in service(s). Specifications provided by a vendor that could potentially be responding to the solicitation are not acceptable as this would create a conflict of interest.

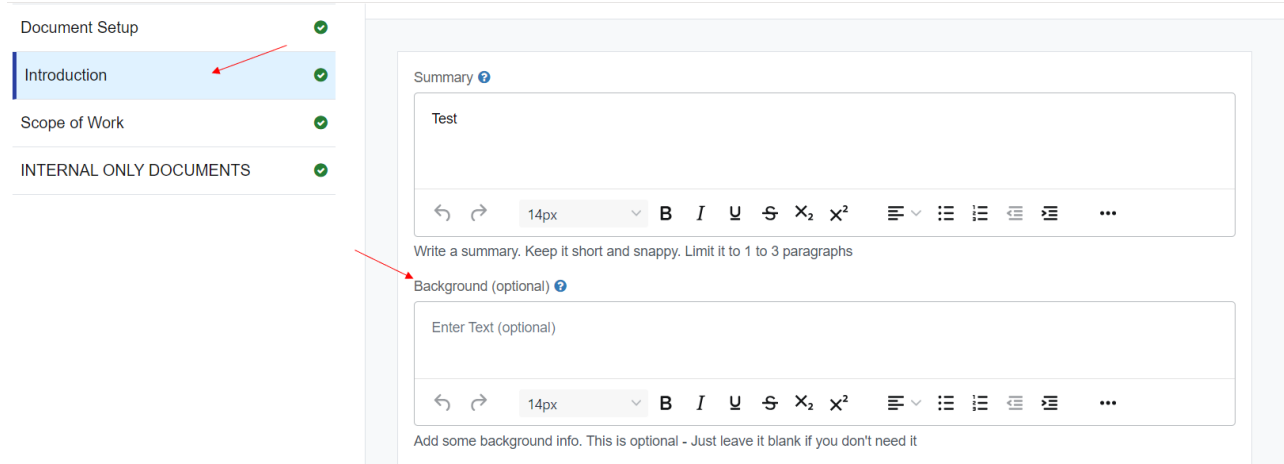
C. **(Buyer)** will add a comment in OpenGov for any additional information needed.

If you wish not to rebid this contract, please follow the steps below:

A. Follow the Rebid/Renewal Intake Form instructions and respond by **(date)** indicating that you wish not to rebid this contract.

If applicable, I understand that I must submit a new Sole Source Justification form annually. This can be created when submitting the requisition as a Sole Source Requisition Type in Workday if the purchase is over \$10,000. If none of the purchases under a sole source contract will exceed \$10,000 then the Purchasing Department can provide a Sole Source Justification Form to be completed and it will be attached to the contract in Workday. If available, a signed letter from the vendor on their letterhead, verifying that they are

- Enter the estimated spend next to your name listed in the Background section. If the contract is no longer required, enter a comment indicating that you wish not to rebid the contract. Click Next to proceed to the Scope of Work section.



Document Setup ✓

Introduction ✓

Scope of Work ✓

INTERNAL ONLY DOCUMENTS ✓

Summary ⓘ

Test

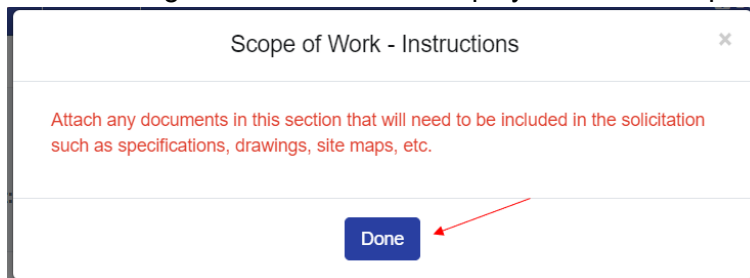
Write a summary. Keep it short and snappy. Limit it to 1 to 3 paragraphs

Background (optional) ⓘ

Enter Text (optional)

Add some background info. This is optional - Just leave it blank if you don't need it

- The following instructions will be displayed for the Scope of Work section. Click done to proceed.



Scope of Work - Instructions

Attach any documents in this section that will need to be included in the solicitation such as specifications, drawings, site maps, etc.

Done

The buyer will have uploaded the specifications used previously here for each stakeholder to review and edit as needed.

- To attach documents, drop files or add files by clicking the blue Drop some files here or click to select files to upload. Attach any documents here that will need to be attached in the solicitation.

Upload a file or spreadsheet containing detailed requirements for your project (if needed)


Drop some files here or click to select files to upload.






- Click Upload. Once all documents are uploaded, click Next to proceed to the Internal Only Documents.


Upload a file or spreadsheet containing detailed requirements for your project (if needed)

Drop some files here or click to select files to upload.



Attachment ID	Title	
  F	TEST	


Uploaded Attachments:

ack 

- The following instructions will be displayed for the Internal Only Documents section. Do not attach anything in this section that needs to be attached to the solicitation. Click done to proceed.

INTERNAL ONLY DOCUMENTS - Instructions

Attachments in this area are for internal use only. If you are attaching information that will need to go in the solicitation, add it to the Scope of Work Section.




Attachments in this area are for internal use only. If you are attaching information that will need to go in the solicitation, add it to the Scope of Work Section.

- To attach documents in the Project Request Documents, drop files or add files by clicking the blue Drop some files here or click to select files to upload. Attach any documents here that will need to be attached in the solicitation. Click next to proceed to the Internal Only Documents Section.

Upload a file or spreadsheet containing detailed requirements for your project (if needed)


Drop some files here or click to select files to upload.






- Click Upload.

Upload a file or spreadsheet containing detailed requirements for your project (if needed)

Drop some files here or click to select files to upload.



Attachment ID	Title	
  F	TEST	

Uploaded Attachments:

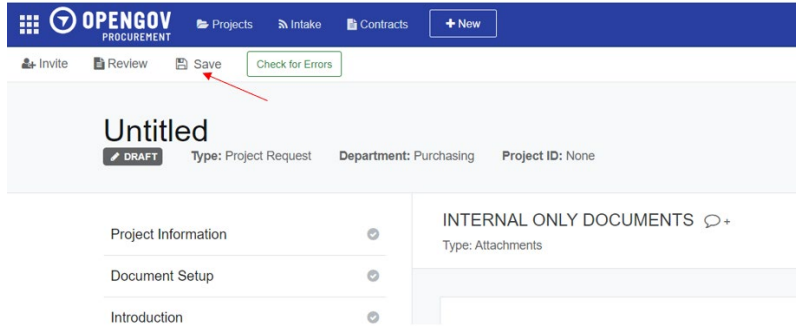


Procurement:

INTAKE FORM FOR REBID MULTIPLE STAKEHOLDERS



10. Once all information is added, Click Save at the top left of the screen.

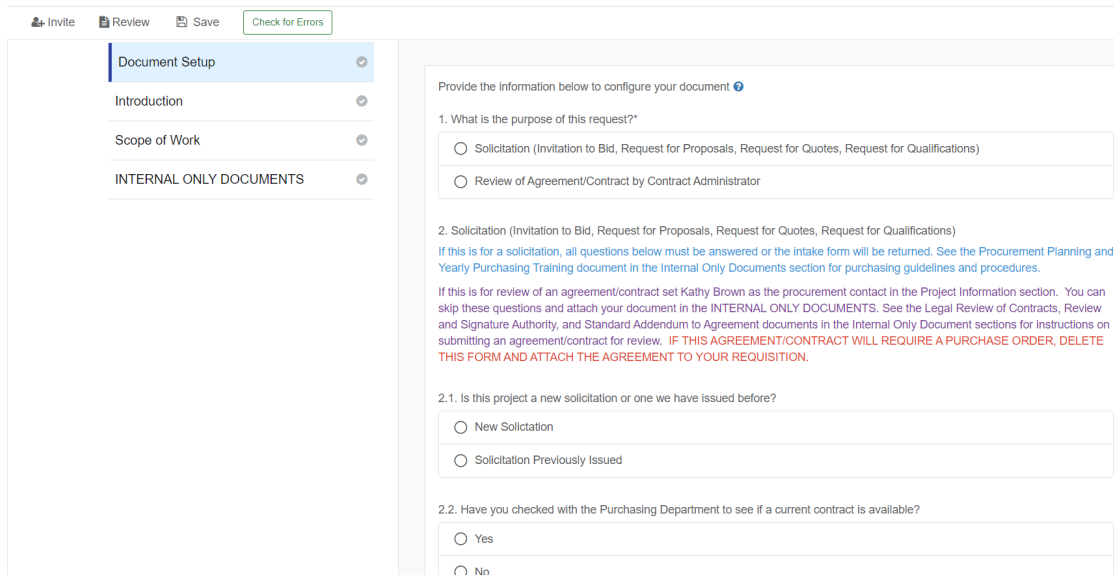


11. Once all stakeholders have entered the required information, the buyer will review and then submit the Intake Form.

INTAKE FORM FOR RENEWAL – ONE STAKEHOLDER

You will receive a notification when you are invited to view an intake form for a contract that is due to be renewed. The Project Information section will have the information entered prior to receiving the notification.

1. Click on the Document Setup Section on the left side of the screen. Answer the questions that populate. Once completed, click Next to proceed to the Introduction Section.



Invite Review Save Check for Errors

Document Setup

Introduction

Scope of Work

INTERNAL ONLY DOCUMENTS

Provide the information below to configure your document

1. What is the purpose of this request?*

Solicitation (Invitation to Bid, Request for Proposals, Request for Quotes, Request for Qualifications)

Review of Agreement/Contract by Contract Administrator

2. Solicitation (Invitation to Bid, Request for Proposals, Request for Quotes, Request for Qualifications)

If this is for a solicitation, all questions below must be answered or the intake form will be returned. See the Procurement Planning and Yearly Purchasing Training document in the Internal Only Documents section for purchasing guidelines and procedures.

If this is for review of an agreement/contract set Kathy Brown as the procurement contact in the Project Information section. You can skip these questions and attach your document in the INTERNAL ONLY DOCUMENTS. See the Legal Review of Contracts, Review and Signature Authority, and Standard Addendum to Agreement documents in the Internal Only Document sections for instructions on submitting an agreement/contract for review. **IF THIS AGREEMENT/CONTRACT WILL REQUIRE A PURCHASE ORDER, DELETE THIS FORM AND ATTACH THE AGREEMENT TO YOUR REQUISITION.**

2.1. Is this project a new solicitation or one we have issued before?

New Solicitation

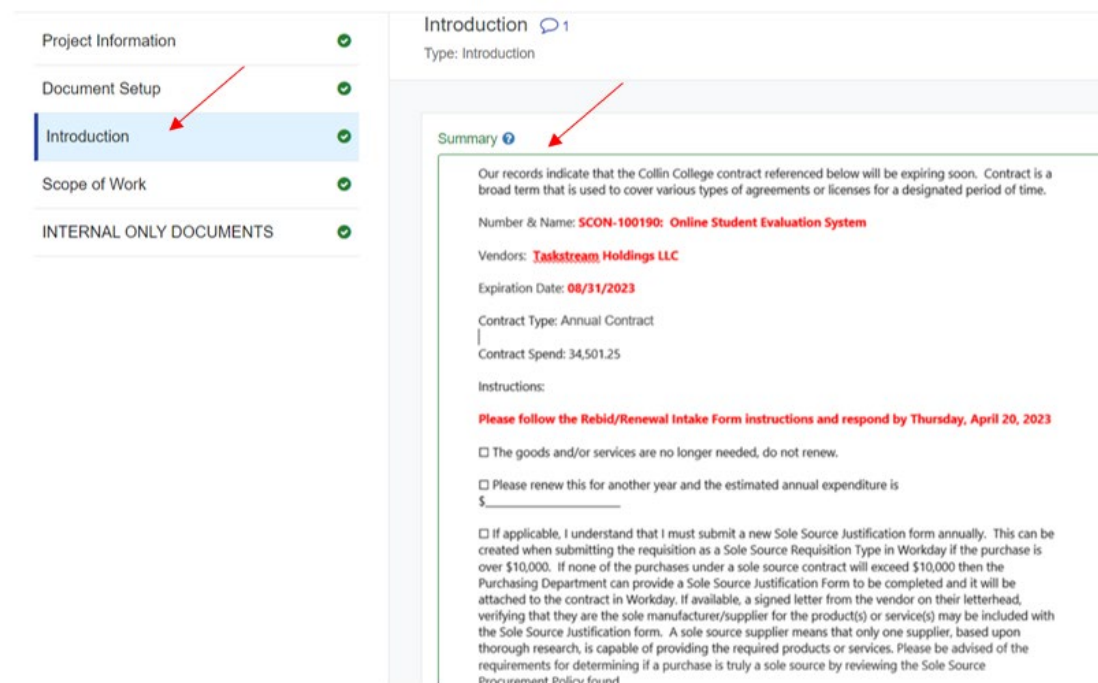
Solicitation Previously Issued

2.2. Have you checked with the Purchasing Department to see if a current contract is available?

Yes

No

2. The Introduction Section will have information completed for review. The Summary section will have detailed information regarding the contract that is due to be renewed.



Project Information

Document Setup

Introduction

Scope of Work

INTERNAL ONLY DOCUMENTS

Introduction 1

Type: Introduction

Summary

Our records indicate that the Collin College contract referenced below will be expiring soon. Contract is a broad term that is used to cover various types of agreements or licenses for a designated period of time.

Number & Name: **SCON-100190: Online Student Evaluation System**

Vendors: **Taskstream Holdings LLC**

Expiration Date: **08/31/2023**

Contract Type: Annual Contract

Contract Spend: 34,501.25

Instructions:

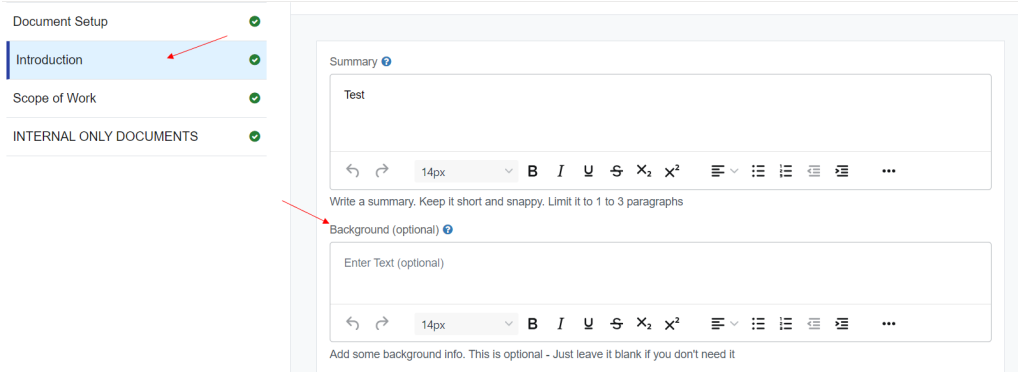
Please follow the Rebid/Renewal Intake Form instructions and respond by Thursday, April 20, 2023

The goods and/or services are no longer needed, do not renew.

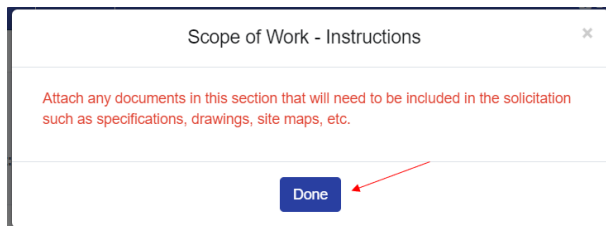
Please renew this for another year and the estimated annual expenditure is \$ _____

□ If applicable, I understand that I must submit a new Sole Source Justification form annually. This can be created when submitting the requisition as a Sole Source Requisition Type in Workday if the purchase is over \$10,000. If none of the purchases under a sole source contract will exceed \$10,000 then the Purchasing Department can provide a Sole Source Justification Form to be completed and it will be attached to the contract in Workday. If available, a signed letter from the vendor on their letterhead, verifying that they are the sole manufacturer/supplier for the product(s) or service(s) may be included with the Sole Source Justification form. A sole source supplier means that only one supplier, based upon thorough research, is capable of providing the required products or services. Please be advised of the requirements for determining if a purchase is truly a sole source by reviewing the Sole Source Procurement Policy found

- Enter the estimated spend in the Background section. If the contract is no longer required, enter a comment indicating the goods and/or services are no longer needed, do not renew. Click Next to proceed to the Scope of Work section.



- The following instructions will be displayed for the Scope of Work section. Click done to proceed since new specifications are not required for a renewal. No attachments are required in the scope of work or internal documents section.



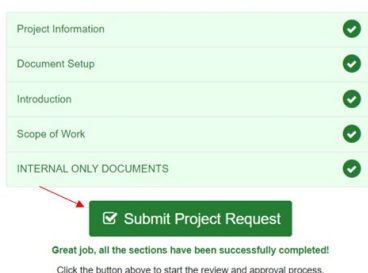
- Questions in the document set up section are not required to answer.
- Return to any section that is not marked with a green check.

Project Request Sections Checklist

Project Information ▲	✔
Document Setup ▲	✔
Introduction ▲	✔
Scope of Work	✔
INTERNAL ONLY DOCUMENTS	✔

- Once all sections are marked completed, click Submit Project Request to start the review and approval process.

Project Request Sections Checklist





Procurement: INTAKE FORM FOR RENEWAL ONE STAKEHOLDER



8. Click Submit For Review.

Confirmation Required

Ready to start the review and approval process?
You will still be able to make changes to your document.

A red arrow points to the 'Submit For Review' button.

9. Your project has been submitted for review. Click Got it!

Great Job!

Your Project Request Has Been Issued!

Your department has pre-set approval groups, so an approver has already been assigned and notified automatically!

You will receive a notification once your request has been processed.

A red arrow points to the 'Got It' button.



Procurement: INTAKE FORM FOR RENEWAL MULTIPLE STAKEHOLDERS



INTAKE FORM FOR RENEWAL - MULTIPLE STAKEHOLDERS

You will receive a notification when you are invited to view an intake form for a contract that is due to be renewed. The Project Information section will have the information entered prior to receiving the notification.

1. Click on the Document Setup Section on the left side of the screen. Answer the questions that populate. Once completed, click Next to proceed to the Introduction Section.

Invite Review Save Check for Errors

Document Setup Introduction Scope of Work INTERNAL ONLY DOCUMENTS

Provide the information below to configure your document

1. What is the purpose of this request?

Solicitation (Invitation to Bid, Request for Proposals, Request for Quotes, Request for Qualifications)

Review of Agreement/Contract by Contract Administrator

2. Solicitation (Invitation to Bid, Request for Proposals, Request for Quotes, Request for Qualifications)

If this is for a solicitation, all questions below must be answered or the intake form will be returned. See the Procurement Planning and Yearly Purchasing Training document in the Internal Only Documents section for purchasing guidelines and procedures.

If this is for review of an agreement/contract set Kathy Brown as the procurement contact in the Project Information section. You can skip these questions and attach your document in the INTERNAL ONLY DOCUMENTS. See the Legal Review of Contracts, Review and Signature Authority, and Standard Addendum to Agreement documents in the Internal Only Document sections for instructions on submitting an agreement/contract for review. IF THIS AGREEMENT/CONTRACT WILL REQUIRE A PURCHASE ORDER, DELETE THIS FORM AND ATTACH THE AGREEMENT TO YOUR REQUISITION.

2.1. Is this project a new solicitation or one we have issued before?

New Solicitation

Solicitation Previously Issued

2.2. Have you checked with the Purchasing Department to see if a current contract is available?

Yes

No

2. The Introduction Section will have information completed for review. The Summary section will have detailed information regarding the contract that is due to be renewed.

Project Information Document Setup Introduction Scope of Work INTERNAL ONLY DOCUMENTS

Introduction 1
Type: Introduction

Summary

Our records indicate that the Collin College contract referenced below will be expiring soon. Contract is a broad term that is used to cover various types of agreements or licenses for a designated period of time.

Number & Name: **SCON-100190: Online Student Evaluation System**

Vendors: **Taskstream Holdings LLC**

Expiration Date: **08/31/2023**

Contract Type: Annual Contract

Contract Spend: 34,501.25

Instructions:

Please follow the Rebid/Renewal Intake Form instructions and respond by Thursday, April 20, 2023

The goods and/or services are no longer needed, do not renew.

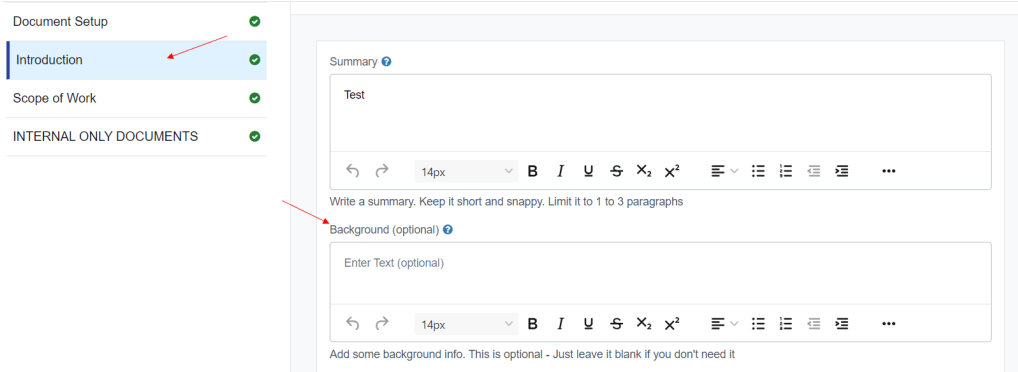
Please renew this for another year and the estimated annual expenditure is \$ _____

If applicable, I understand that I must submit a new Sole Source Justification form annually. This can be created when submitting the requisition as a Sole Source Requisition Type in Workday if the purchase is over \$10,000. If none of the purchases under a sole source contract will exceed \$10,000 then the Purchasing Department can provide a Sole Source Justification Form to be completed and it will be attached to the contract in Workday. If available, a signed letter from the vendor on their letterhead, verifying that they are the sole manufacturer/supplier for the product(s) or service(s) may be included with the Sole Source Justification form. A sole source supplier means that only one supplier, based upon thorough research, is capable of providing the required products or services. Please be advised of the requirements for determining if a purchase is truly a sole source by reviewing the Sole Source Procurement Policy found

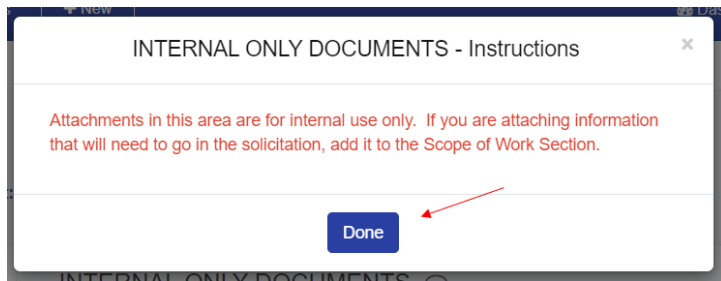
Procurement:

INTAKE FORM FOR RENEWAL MULTIPLE STAKEHOLDERS

- Enter the estimated spend next to your name listed in the Background section. If the contract is no longer required, enter a comment indicating the goods and/or services are no longer needed, do not renew. Click Next to proceed to the Scope of Work section.

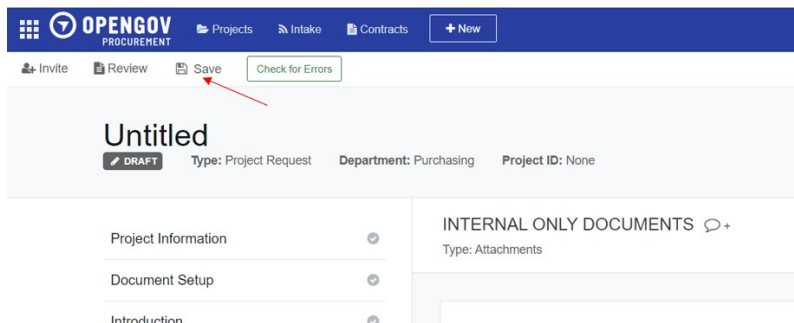


- The following instructions will be displayed for the Internal Only Documents section. Do not attach anything in this section that needs to be attached to the solicitation. Click done to proceed.



Attachments in this area are for internal use only. If you are attaching information that will need to go in the solicitation, add it to the Scope of Work Section.

- Questions in the document set up section are not required to answer.
- Once all information is added, Click Save at the top left of the screen.

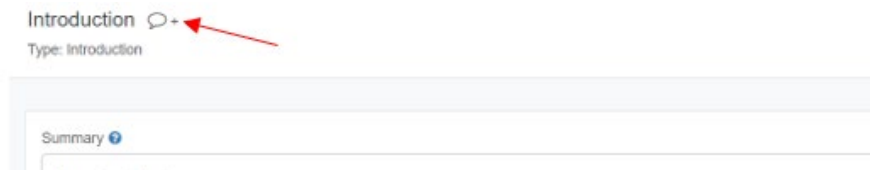


- Once all stakeholders have entered the required information, the buyer will review and then submit the Intake Form.

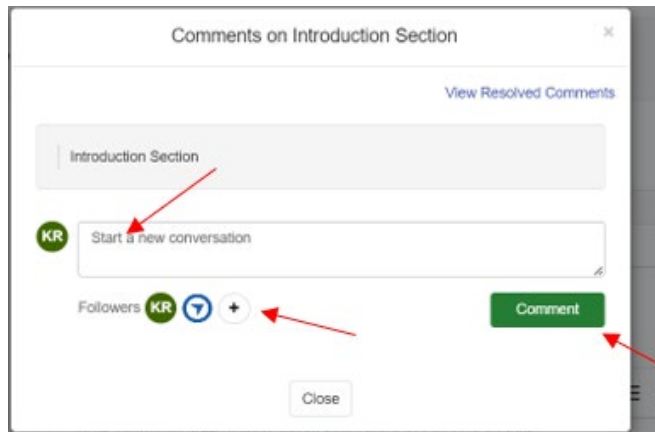
CREATE, VIEW & RESPOND TO COMMENTS

Creating A Comment

1. To add a comment, click on the Chat sign located in different sections of the project.

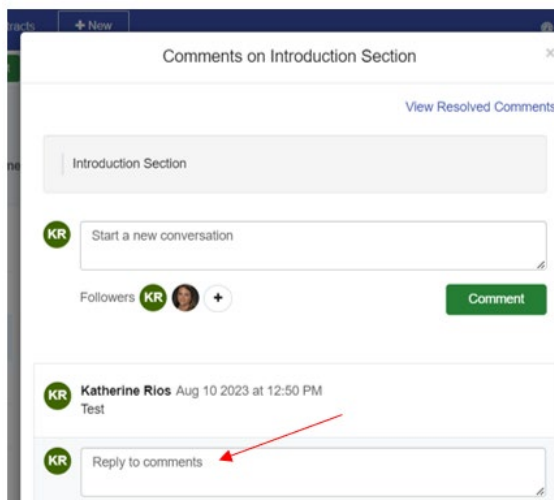


2. Tag the person to receive the comment by clicking the plus sign + and select their name. Enter the comment in the Start a New Conversation field. Click Comment.

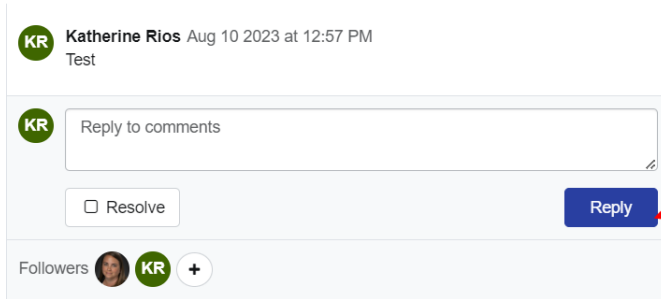


Viewing and Responding to Comments

1. When notification is received that a comment was added, click on the link to view the comment. The comment will display and a reply section will be available to enter your comment. Click in the Reply to Comments field to enter your comment.



2. Once finished with your response, click Reply. Click Close to close the comment section.



A screenshot of a comment interface. At the top, a user profile for Katherine Rios is shown with a green 'KR' icon, the name 'Katherine Rios', the date 'Aug 10 2023 at 12:57 PM', and the text 'Test'. Below this is a text input field with a placeholder 'Reply to comments' and a green 'KR' icon on the left. Underneath the input field are two buttons: a white 'Resolve' button with a checkbox and a blue 'Reply' button. At the bottom of the comment section, there is a 'Followers' section showing a profile picture, a green 'KR' icon, and a plus sign.



A white rectangular button with the text 'Close' inside. A red arrow points to the button from the right.



Procurement:
VIEWING & EDITING
INTAKE FORM REQUESTS

