



Supplier Portal User Guide: Viewing & Responding to Events

SUPPLIER PORTAL USER GUIDE - VIEWING & RESPONDING TO EVENTS

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SECTION 1 - Browse Open Events

- A. Events are opportunities to do business with RGRTA and are associated with one or more Commodity Codes. These commodity codes dictate the firms automatically notified of the event

1.1 *Browsing Events without Logging In*

- A. Prior to logging in, information about open events will be available to view.
- B. To act on an open event, you must be logged in to the portal.

1.2 *Browsing Events After Logging In*

- A. Once you are logged in to the Home Page, click “Browse Open Events” to display a list of all Open Events or to search for events.
- B. Events may be found through a variety of search functions:
 - a. Event #: Enter the event number provided in the notification or Legal Notice published in the Rochester Business Journal, Minority Reporter, or the New York State Contract Reporter.
 - b. Keyword: Find a Name, Description, or Event # containing the word.
 - c. Name: Find a Name that begins with the word; or put an asterisk * before and after the word to find a Name containing the word.
 - d. Category: Find a contract with the selected Category.
 - e. Type: Find a category with the selected Type.
- C. Once the appropriate search box, or boxes, have been filled, click the Search button.

SECTION 2 - View an Event

- A. An Event consists of several different tabs, which may vary by event.

2.1 *Summary Tab*

2.1.1 *Dates*

- A. The definitions of the date categories are as follows:
 - a. Preview: The date and time to begin viewing the event prior to the Open date.
 - i. * During this time, you will be able to view every aspect of the Event, including attachments, and ask questions in the Q&A Forum tab, however you will not be able to submit respond to the Event until its status is Open.
 - b. Q&A Open: The date and time to begin asking questions.
 - c. Q&A Close: The cutoff date and time to ask questions.
 - d. Open: The date and time you will be eligible to submit a response.
 - e. Close: The cutoff date and time to submit responses.

2.1.2 *Description*

- A. This section provides an overview of the event and the goods/services being procured.

2.1.3 *Rules*

- A. This section provides a list of rules and other criteria that suppliers will follow during the bidding process.

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2.1.4 Meetings

- A. This section displays a list of meetings for suppliers to attend regarding the event. These may include pre-proposal/bid meetings and site visits. Not all events will have meetings.

2.2 Contacts Tab

- A. This section displays contact information for certain people who are associated with the event.
- B. It is a violation of NYS Finance Law to contact any RGRTA staff (other than those listed) about an Event.

2.3 Attachments Tab

- A. This section displays links to supplemental files. Not all events will have attachments.

2.4 Questions Tab

- A. This tab displays questions to be answered when responding to the event.
- B. Event Questions may have forms that are required to be completed and provided when answering the question. It is recommended to download these forms and have them completed prior to logging in to respond to the event.

2.5 Terms and Conditions Tab

- A. This tab displays the terms and conditions of the event and resulting contract if you are awarded.
 - a. Terms and conditions may have attachments. If there is an attachment, click the term and condition to locate the attachments tab. Click the file link to open the document.
- B. Submission of a response to an Event indicates agreement with and acceptance of all the terms and conditions presented.
- C. Responses proposing changes to the terms and conditions may be deemed non-responsive.
- D. Any request for clarifications or request for material changes to the Terms and Conditions as well as any other aspect of the event shall be submitted on the Q and A Forum tab prior to the Q&A Close date and time.

2.6 Lines Tab

- A. This tab displays the individual lines of the event.
- B. A line may have attachments. To check, click on the event line to display the Line Summary page.
 - a. If there is an attachment, click the file link to open the document.

2.7 Q And A Forum Tab

- A. Suppliers may ask questions to gather more information about the event or to request changes to Terms and Conditions of the Event. (Note: check the Dates section of the Event Summary page to see when the Q&A period opens and closes.)

2.7.1 How to Ask a Question

- A. Click the Ask a Question button to display the Ask a Question page and enter your question in the text box provided.
 - a. If you are entering multiple questions, click the Save and New button to submit the question and remain on the page to enter the next question.
- B. To enter a single question, click the Save button to submit and return to the Event Summary tab.

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- C. Once answered, the question will be displayed as is. Do not put proprietary info in the question.

2.7.2 *How Questions are Answered*

- A. The Primary or Secondary Contact of the event receives all Q&A questions. Answers may be provided in the following ways:
 - a. Answers are displayed on the Event Summary - Q And A Forum tab.
 - b. Answers incorporated into an event Amendment creating a new version of the event and the comments are visible on the Event Summary - Amendments tab.

2.8 *Amendments Tab*

- A. When an open event is amended (modified and released), the events list updates the version number of the event. This tab displays the date of each version change, and the associated comments.

2.9 *Plan Holders List Tab*

- A. Suppliers appear on the Plan Holders List tab by either
 - a. Adding themselves by click the “Actions” button on the Event Summary page OR
 - b. The procurement officer can add them.
- B. The Plan Holders List allows supplier and subcontractors the ability to work together.

SECTION 3 - Respond to an Event

- A. Prior to responding to an event, we recommend you complete the following tasks:
 - a. Download the forms that accompany the Event questions and complete them in advance.
 - b. Carefully review the Terms and Conditions.
 - c. Review the Q And A Forum.
 - d. Review the Amendments for changes to the event.

3.1 *Notifying RGRTA You Will Not Submit a Response*

- A. Click the event number to display the Event Summary page and then click “No Bid”.

3.2 *Submitting a Response*

- A. Click the event number to display the Event Summary page and then click “Respond Now”.
 - a. If the “Respond Now” button is not visible, review the Open and Close dates of the Event.

3.2.1 *Accepting Terms and Conditions*

- A. Click the link to review all terms and conditions.
- B. Check box labeled “I accept the terms and conditions for this event...” and click Continue.

3.3 *Line Responses*

- A. In this step, you respond to the lines by clicking the “Respond” link at the end of the line.
- B. In the Response Information section, enter the required information, description of the fields below and click continue.

3.4 *Question Responses*

- A. In this step, you provide answers to questions. You may be required to upload a document with the question response. You will receive an error if you fail to attach a response.

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- B. Click the Continue button to move to the next step.

3.5 *Attachments*

- A. In this step, you can attach documents to support your response.
- B. Follow these guidelines for attaching documents:
 - a. Do not submit ZIP files.
 - b. Keep file names shorter than 50 characters, including the file extension.
- C. When attaching a bid sheet, leave the document in MS Excel format (.xlsx) and do not protect the worksheet or workbook.
- D. If it is an RFP, name the Proposal documents with the naming convention required in the Event.

3.5.1 *Steps to Add an Attachment*

- A. Click the Add button to display the Event Response – Attachments window.
- B. Click the Browse button to open the File Explorer window.
- C. Navigate to the desired folder, select the desired file, and then click the Open button. The file information appears in the Title and File fields.
- D. Click the Continue button to add the file to the attachments list.
- E. Repeat the steps above to attach another document. Otherwise, click the Continue button to move to the next step.

3.5.2 *How to View an Attached Document*

- A. If you want to double check the file that is attached, click the link in the File column.

3.5.3 *How to Rename an Attachment*

- A. Change the text in the Attachment Title column.

3.5.4 *How to Delete an Attachment*

- A. Select the check box to the left of the document title, and then click the Delete button.

3.6 *Submit Response*

- A. Note: If responses are incomplete, or you want to change any of the responses, click the Back button.
- B. If you'd like, click the Print My Response button to generate a printable copy of your submission.
- C. When you are satisfied, click the Submit button. A message confirms that the response has been submitted.
- D. Click the Done button to return to the Home page.

SECTION 4 - Edit an Unsubmitted Response

- A. When going through the steps of a response, each time you click the Continue button, the event updates with the information you have provided up to that step.
- B. If you cannot complete the response for some reason, click the Cancel button to exit the response.
- C. There are several ways to resume editing an unsubmitted response.

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4.1 *Edit from the Open Events list*

- A. Browse the open events and click the Edit Response button at the right side of the page.

4.2 *Edit from the Event Summary page*

- A. Browse the open events and click the event number to display the Event Summary page.
- B. Click the Edit Response button at the top of the page.

SECTION 5 - Modify or Withdraw a Submitted Response

- A. You may change your responses to an event after submitting them if the event period is still open.
- B. To modify or withdraw a submitted response, you must first view the response by accessing either the:
 - a. Open Events List
 - i. Browse open events and click the View Response button at the right side of the list.
 - b. Event Summary Page
 - i. Browse open events and click the event number to display the Event Summary page and click the View Response button at the top of the page.

5.1 *Modify a Response*

- A. After clicking the View Response button, the Event Response tabs page will open.
- B. Click the Actions button and then select Modify Response.
- C. The confirmation message indicates that the response must be resubmitted.
- D. Click OK to display the Event Response page and continue with the Event Response steps.
- E. Click the Actions button and then select Submit Response.

5.2 *Withdraw a Response*

- A. After clicking the View Response button, the Event Response tabs page will open.
- B. The confirmation message appears.
- C. Click OK to return to the Event Responses tabs page.

5.3 *Reinstate a Withdrawn Response*

- A. In the Event Responses page, a withdrawn response can be reinstated, and then it must be re-submitted.
- B. In the Open Events list, click the View Response button for the desired event.
- C. Click the Actions button and then select Reinstate Response.
- D. The confirmation message indicates that the response must be resubmitted.
- E. Click OK to display the Event Response page and Continue with the Event Response steps.

SECTION 6 - View My Responses

- A. On the Supplier Home Page, click My Responses, to display the My Responses page.
- B. The Unsubmitted Initial Responses tab shows events with responses that have been started, modified, or reinstated, but have not yet been submitted.
- C. The Responses Open For Award tab shows events with responses that have been submitted.
- D. Note: Use the Historical Responses tab to see all events with responses of any status.