How to Prepare a Requisition for a Request For Proposal “RFP”

- To submit a Requisition for a Request For Proposal “RFP” use the zero dollar requisition procedure that begins on page 2.
- The RFP template in Microsoft Word version and an RFP checklist are stored in the ARC for agency use.
- The requisition must include the following information:

<table>
<thead>
<tr>
<th>Bid Title</th>
<th>Additional information may be provided in the Requisition Lines.</th>
<th>Control Value in the Requisition Header (the anticipated cost over the entire contract term).</th>
<th>Blanket Period in the Requisition Header (the anticipate contract term in its entirety).</th>
<th>Upload in the Requisition Header - the Agency Completed RFP Solicitation in Microsoft Word version.</th>
</tr>
</thead>
</table>

- Bid Title of the procurement in the Requisition Header (should be identical to the Bid Title in agency’s RFP Template).

To submit a Requisition for a Request For Proposal “RFP” use the zero dollar requisition procedure that begins on page 2.

The RFP template in Microsoft Word version and an RFP checklist are stored in the ARC for agency use.

The requisition must include the following information:
STATE OF RHODE ISLAND
DEPARTMENT OF ADMINISTRATION
DIVISION OF PURCHASES

RIFANS

PURCHASE AGREEMENT
REQUEST (ZERO DOLLAR
REQUISITION) INSTRUCTIONS
LOG IN SCREEN
HOME SCREEN

CLICK ON: REQUISITIONER
SHOP SCREEN

CLICK ON: NON CATALOG REQUEST
ENTER LINE INFORMATION:

- ITEM DESCRIPTION
- CATEGORY
- QUANTITY
- UNIT OF MEASURE
- UNIT PRICE (ENTER “0” ZERO)

***** NOTE *****

IF PURCHASE ORDER IS CROSSING OVER INTO DIFFERENT FISCAL YEARS, SET UP A LINE FOR EACH ITEM FOR EACH FISCAL YEAR.

THIS EXAMPLE IS A PURCHASE AGREEMENT TO GO OUT TO BID FOR THREE FISCAL YEARS:

FIRE ALARM REPAIRS FOR FY16, FY17, FY18
FIRE ALARM TESTING FOR FY16, FY17, FY18
FIRE ALARM INSPECTIONS FOR FY16, FY17, FY18
ENTER LINE NO. 1 INFORMATION

CLICK ON: ADD TO CART
EDIT INFORMATION FOR LINE NO. 2
CLICK ON: ADD TO CART

****** NOTE******
IF PURCHASE ORDER IS CROSSING OVER INTO DIFFERENT FISCAL YEARS, SET UP A LINE FOR EACH ITEM FOR EACH FISCAL YEAR.
EDIT INFORMATION FOR LINE NO. 3

CLICK ON: ADD TO CART

****** NOTE******
IF PURCHASE ORDER IS CROSSING OVER INTO DIFFERENT FISCAL YEARS, SET UP A LINE FOR EACH ITEM FOR EACH FISCAL YEAR.
EDIT INFORMATION FOR LINE NO. 4

CLICK ON: ADD TO CART

***** NOTE *****

IF PURCHASE ORDER IS CROSSING OVER INTO DIFFERENT FISCAL YEARS, SET UP A LINE FOR EACH ITEM FOR EACH FISCAL YEAR.
EDIT INFORMATION FOR LINE NO. 5

CLICK ON: ADD TO CART

***** NOTE *****

IF PURCHASE ORDER IS CROSSING OVER INTO DIFFERENT FISCAL YEARS, SET UP A LINE FOR EACH ITEM FOR EACH FISCAL YEAR.
EDIT INFORMATION FOR LINE NO. 6

CLICK ON: ADD TO CART

****** NOTE******
IF PURCHASE ORDER IS CROSSING OVER INTO DIFFERENT FISCAL YEARS, SET UP A LINE FOR EACH ITEM FOR EACH FISCAL YEAR.
EDIT INFORMATION FOR LINE NO. 7

CLICK ON: ADD TO CART

****** NOTE******
IF PURCHASE ORDER IS CROSSING OVER INTO DIFFERENT FISCAL YEARS, SET UP A LINE FOR EACH ITEM FOR EACH FISCAL YEAR.
EDIT INFORMATION FOR LINE NO. 8

CLICK ON: ADD TO CART

****** NOTE******
IF PURCHASE ORDER IS CROSSING OVER INTO DIFFERENT FISCAL YEARS, SET UP A LINE FOR EACH ITEM FOR EACH FISCAL YEAR.
EDIT INFORMATION FOR LINE NO. 9

CLICK ON: ADD TO CART

****** NOTE******
IF PURCHASE ORDER IS CROSSING OVER INTO DIFFERENT FISCAL YEARS, SET UP A LINE FOR EACH ITEM FOR EACH FISCAL YEAR.
WHEN ALL LINES HAVE BEEN ADDED TO THE CART

CLICK ON: VIEW CART AND CHECKOUT
REVIEW LINES

CLICK ON: CHECKOUT
REQUISITION DESCRIPTION IS PULLED FROM ITEM LINE NO. 1. THIS SHOULD BE CHANGED TO REFLECT THE TITLE OF THE ENTIRE REQUISITION.

ENTER

- REQUISITION DESCRIPTION (TITLE)
- DOCUMENT TO CREATE: PURCHASE AGREEMENT
- TYPE OF REQUISITION
- PRIOR PO NUMBER IF APPLICABLE
- BILL TO LOCATION

***** NOTE*****
THE BUYER ASSIGNED TO PROCESS THIS WILL DETERMINE WHETHER THIS WILL BE SET UP AS A BLANKET PURCHASE AGREEMENT OR A CONTRACT PURCHASE AGREEMENT
CLICK ON: EDIT LINES
CLICK ON: ENTER CHARGE ACCOUNT
IF CHARGE ACCOUNT IS KNOW
ENTER IN RI ACCOUNTING FLEX FIELD

IF A SEARCH NEEDS TO BE DONE FOR ACCOUNT NUMBER
CLICK ON: ICON

IF SAME ACCOUNT NUMBER WILL BE USED FOR EACH LINE
CLICK ON: APPLY THIS COST ALLOCATION INFORMATION
TO ALL APPLICABLE REQUISITION LINES
CLICK ON: APPLY
IF DIFFERENT ACCOUNT NUMBERS WILL BE USED FOR EACH LINE DO NOT CLICK ON APPLY THIS COST ALLOCATION INFORMATION TO ALL APPLICABLE REQUISITION LINES.

CLICK ON ENTER CHARGE ACCOUNT FOR EACH LINE TO ENTER CHARGE ACCOUNT INFORMATION

CLICK ON: APPLY
CLICK ON: ATTACHMENTS
CLICK ON: ADD ATTACHMENT

(THIS IS CONSIDERED THE HEADER ATTACHMENT)

****IMPORTANT****
ONLY USE THIS HEADER ATTACHMENT FOR "INTERNAL" ATTACHMENTS.

(REASON: ALL ATTACHMENTS DONE ON THE HEADER AS "TO SUPPLIER" WILL PRINT OUT ON EACH LINE WHEN IT GETS CREATED INTO A BID)
ENTER TITLE: CONTROL VALUE

SELECT CATEGORY: INTERNAL TO REQUISITION

SELECT TEXT: ADD APPLICABLE TEXT (SEE EXAMPLE ABOVE)

CLICK ON: APPLY
ADD A LINE ATTACHMENT TO THE VERY LAST LINE.

CLICK ON: PLUS ICON ON LAST LINE
ENTER TITLE:

SELECT CATEGORY: TO SUPPLIER

(WHEN SELECTING TO SUPPLIER IT WILL PRINT ON THE REQUISITION)

SELECT TEXT: ENTER PURCHASE AGREEMENT INFORMATION (SEE ABOVE EXAMPLE)

CLICK ON: APPLY
HEADER ATTACHMENT WILL APPEAR

LINE ATTACHMENT WILL APPEAR NEXT TO LAST LINE AS AN ICON

IF ANY OTHER ATTACHMENTS ARE REQUIRED REPEAT THE PROCESS ABOVE. IF ATTACHING A FORM OR SPECIFICATIONS SELECT “FILE” AND “BROWSE” TO FIND YOUR ATTACHMENT.

REMEMBER: SELECT INTERNAL WHEN INFORMATION IS JUST FOR PURCHASING. ANY TIME “TO SUPPLIER” IS SELECTED IT WILL PRINT OUT ON THE REQUISITION.

WHEN ATTACHMENTS ARE COMPLETED

CLICK ON: APPLY
CLICK ON: SUBMIT
GO BACK TO YOUR SHOP TAB TO CONFIRM THAT REQUISITION STATUS IS: “IN PROCESS”
The requisition **must** include the following information:

- **Bid Title**: Bid Title of the procurement in the Requisition Header (should be identical to the Bid Title in agency’s RFP Template).
- **Additional information**: Additional information may be provided in the Requisition Lines.
- **Control Value**: Control Value (the anticipated cost over the entire contract term).
- **Blanket Period**: Blanket Period (the anticipate contract term in its entirety).
- **Upload RFP Template**: Upload to the Final Line of the Requisition - the Agency Completed Microsoft Word RFP Solicitation.
IF REQUISITION STATUS WAS “INCOMPLETE” RETURN TO THE HOME PAGE TO CHECK NOTIFICATION. CLICK ON NOTIFICATION TO OPEN IT. NOTIFICATION SHOULD INFORM YOU OF WHAT IS MISSING OR IF THERE IS A FUNDING ISSUE.

CORRECT IF NEEDED AND RE-SUBMIT.