DAS Procurement Services

ORPIN Full System Training
Desk Reference Guide
For ORCPP Members

For help with posting notices or adding and deleting users, please contact us at:
Info.orcpp@oregon.gov
or by phone at:
Kelly Stevens-Malnar 503-378-3976 Adam Helvey 503-373-2106

Table of Contents

I. Updating Your Profile:

Use the **Verify/Change Your Information** area to update your profile.

1. Click on **Verify/Change Your Information** in the left hand menu bar.
2. Click on **User Information** to access your address, phone number, email, and account preferences options.
3. To change any of the contact information, simply click the **Add/Edit** button next to it. Make your changes and hit the **Submit/Return** button to save them.
4. To change your account preferences, click the **Add/Edit** button next to "Preferences". Most of these settings will be blank.
   a. If you are going to be creating notices, it is recommended that you check **Yes** next to the "Leave document open upon completion?" option. This will leave your document up on the screen after you complete the Issue step in the workflow. Without this option checked, when you complete the Issue step the document will flash once and then disappear. You will then have to search for it again to see it.
   b. If you will not be creating notices, it is recommended that you set the default for the "Document Search Default" option to **By Document Number**. If you do not change this setting, you will have to manually change the Search By field every time you perform a document search.

Email sent from user's email program	○ Yes ○ No
Auto Refresh Progression?	● Yes ○ No
Show document completed message?	○ Yes ○ No
Leave document open upon completion?	● Yes ○ No
Advanced Opportunity Search Sorted by	[▾]
Language	* English ▾
Font Size Offset	[ ]
Default Document Search Date Type	[▾]
Default Document Search Status	[▾]
Job Description	[ ]
Document Search Default	Find by Document Number ▾

Use the **Organization Hierarchy** area to view your agency settings.

1. Click on **Verify/Change Your Information** in the left hand menu bar.
2. Click on **Organization Hierarchy** to see the agency that you are attached to in ORPIN.
3. Click on the **View All** button to see the other users attached to your agency as well.

Use the **Change Logon Password** area to reset the password attached to your login username.

1. Click on **Verify/Change Your Information** in the left hand menu bar.
2. Click on **Change Logon Password**.
3. Enter your current password in the first field
4. Create a new permanent password in the second field. It must be at least six characters long and contain at least one letter and one number.
5. Confirm the new password in the third field.
6. Click **Submit** to save your changes.

Change Password

(Prod)

⊘ To change your password, please complete and submit the form below.

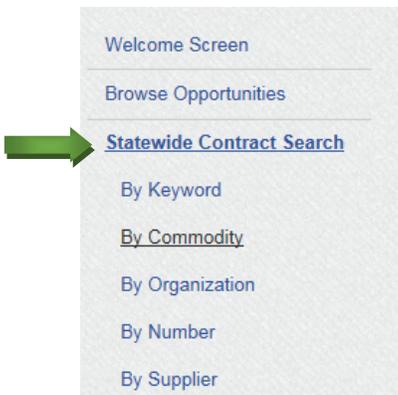|		
Current Password	*	[ ]
New Password	*	[ ]
Confirm Password	*	[ ]

Submit

* indicates a required field

II. Statewide Contract Search:

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

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

Welcome Screen

Browse Opportunities

➡ **Statewide Contract Search**

By Keyword

By Commodity

By Organization

By Number

By Supplier

Statewide Contract Search

(Prod)

⊘ By Keyword
Find active Contracts by Keywords used in the Title, Item Description, or Document Comments

⊘ By Commodity
Find active Contracts by NIGP with the Contract items

⊘ By Organization
Find active Contracts by the Issued For Agency

⊘ By Number
Find Statewide Contracts by E Contract Number

⊘ By Supplier

⊘ All Available Contracts

2. Choose how you would like to look for contracts.
    a. To look up contracts by a keyword, choose **By Keyword**.
        i. Notice which boxes are checked under the keyword field. These are for maximum results, to narrow, you can uncheck in comments.

Statewide Contract Search
(Prod)

⑦ By Keyword

You can search for an exact word (which will include the plural and singular, as well as the gender and neutral forms of that word) or phrase. Phrases must be enclosed in double quotation marks (""). You can also specify a partial word using the wildcard character (*). Using the wildcard character at the end of a phrase will treat each word contained in the phrase as a partial word. See the associated help topic for more information about full-text searches.

Search	⑦
Keywords: [ ]	
☑ In Items ☑ In Title ☑ In Comments	
	Search

⬆
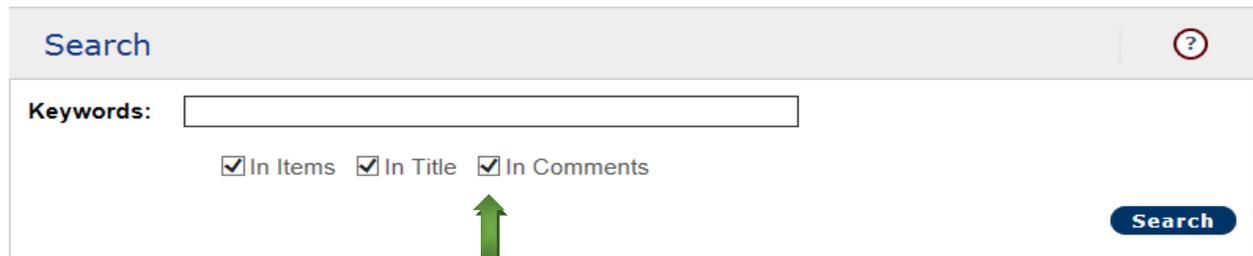
        ii. If you use mutliple words in the **Keywords** field, be aware of using parenthesis and Boolean searches.
    b. Searching **By Commodity** will give you a list of the commodity categories that have active contracts under them.

Statewide Contract Search
(Prod)

⑦ By Commodity

Use the binoculars icon to further drill into the commodity groupings. To find the contracts listed for a specific grouping, click on the commodity grouping. Only commodity groupings that have related contracts are highlighted.

	Commodity Grouping	
1	Administrative, Financial, and Management Services	🕶
2	Agricultural Equipment and Related Products and Services	🕶
3	Arts, Crafts, Entertainment, Theatre	🕶

⬆   ⬆

> Click on a blue **highlighted** commodity grouping to see the contracts within that category **or** click the **binoculars** icon to further refine the category filter

    c. **By Organization** sorts the contracts by agency.
    d. **By Number** will allow you to search for a specific contract by number.
    e. **By Supplier** will allow you to look for contracts that have been awarded to a specific supplier.
        i. Click on the **Find** button first to locate the exact supplier that you want to

search by.

Statewide Contract Search
(Prod)

? By Supplier

Search	?
Supplier: [_____] (Find) (Clear)	
	Search

ii. Enter the supplier's company name and hit **Submit**. All suppliers that match the company name you entered will display. Only suppliers that are highlighted in blue have a contract. Click on their name to view.

Find Suppliers with Awards
(Train2)

Search	?
Supplier: les schwab	
Supplier #:	
	Search

Select the Supplier you wish to search by. Only Suppliers that have awards of the chosen type (All Awards) and status (Active) will be available for selection.

	Supplier #	Supplier	Doing Business As	Location
1	48732	Charles Schwab & Co, Inc.		Seattle, WA
2	59516	Costco Wholesale	les schwab	Wilsonville, OR
3	64994	John Smith, Charles Schwab & Co, Inc.	Charles Schwab & Co, Inc Salem Independent Branch	Salem, OR
4	1394	Les Schwab Warehouse Center, Inc.	Les Schwab Tire Centers of Portland, Inc.	Bend, OR
5	12184	Midway Equipment & Supply Co.	Les Schwab Equipment	Prineville, OR

iii. The supplier name will now appear in your search screen. Hit the **Search** button to conduct the award search.

Statewide Contract Search
(Train2)

(?) By Supplier

Search	(?)
Supplier: office depot (Find) (Clear)	
➡ **Search**	

f. **All Available Contracts** will display contracts your agency is authorized to use.
g. **Printable Index** will give you a downloadable report of all statewide contracts.
3. When the results display, you will see a couple of icons. They are:

⊟ Legend

🏛 View Public Contract   📄 View Summary

(Show Details)

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

IV.   Creating a Notice:

1. Click **Create a Notice** in the left hand menu bar.
2. **Discipline** – Choose the radio button next to the most appropriate Discipline for the purchase. Informational posting is the most-broad option. Click **Next** to continue.
3. **Organizations** – Set the Issued By and Issued For agencies from the dropdowns. (You will only see those agencies you have authority to contract for in the dropdown lists.)
4. **Additional Information** –Select either "ORCPP Bid/RFP" or "Sole Source (ORCPP Only)" from the Type dropdown.
    a. Confirm that there are no existing contracts that could fulfill the purpose of the request. To do this, perform a contract search by clicking the **Browse Contracts** button. Once you have completed your search, check the "I agree…" box to validate that there are no existing contracts.

➡ * ☐ I agree that there is no existing Contract that will fulfill the purpose of this Request.

➡ (Browse Contracts)

b. Confirm that there are no existing QRF contracts that could fulfill the purpose of the request. To do this, perform a contract search by clicking the **Check for existing QRF contracts** button. Once you have completed your search, check the "I agree…" box to validate that there are no existing contracts.

* ☐ I agree that there is no existing QRF Contract that will fulfill the purpose of this Request

(Check for existing QRF contracts)

5. Click the **Create** button to continue.
6. Click the **Continue** button to transfer into the Document Wizard, which will help you fill out the necessary information on your opportunity.

Create Document
(Train2)

Continue

Document Created

Document Number:
Control Number: 1767937

The initial document has been created. To continue setting up the document click on 'Continue'.

(View)

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

1. Document Number
(Test)

Document Number: (DRAFT)   **Control Number:** 1628146

(Skip)   (Back)   (Save)   (Next)   (Finish)

Document Number   ↖ *Use these...* ↗

1. **Document Number**
2. Issued By Address
3. Issued By Contact
4. Issued For Address
5. Document Information
6. More Information
7. Attachments
8. Organization

ⓘ The document number is the reference number for the document/form.

Document Number: *R26921- [   ] -14 [456][123]   *...not these.*

* indicates a required field   ⬆ Top

7. Fill out all of the required information in the Document Wizard.
    a. **Document Number** – Either enter your own document number into the field, or click on the icon to the right for the system to automatically assign it a number. Click **Next** to save and continue.
    b. **Issued By Address** – The address should auto-populate based on the Issued By agency you selected when creating the Notice. You can update it if needed. Click **Next** to save and continue.
    c. **Issued By Contact** – Either choose the contact name from the dropdown list or enter a new one in the fields below. Click **Next** to save and continue.
    d. **Issued For Address** – The address should auto-populate based on the Issued For agency you selected when creating the Notice. You can update it if needed. Click **Next** to save and continue.
    e. **Document Information** – The required fields are indicated with an asterisk.

Document Information

Document Title	*	[ ]
Publish Date/Time (if later than issue date)	[ ] 🔶 (mm/dd/yyyy)	[ ]
Closing Date/Time	* [ ] 🔶 (mm/dd/yyyy)	[ ]
Opening Date/Time (if later than the closing date)	[ ] 🔶 (mm/dd/yyyy)	[ ]
Time Zone	* Pacific Time ▾	
Payment Terms	* [▾]	
Vendor Collected Administrative Fee	[ ] [▾]	

   i. **Publish Date/Time** – This is an __optional__ field. This field allows you to postpone publishing your notice for the public to see. ONLY FILL THIS IN IF YOU NEED TO DELAY PUBLISHING YOUR DOCUMENT. If you leave the Publish Date/Time field blank, ORPIN will automatically publish the document for the public when you process it through the issuing workflow.
   ii. **Closing Date/Time** – Type in the day and time that your notice should close. Click the icon next to the date field to choose the day from a calendar if desired.
   iii. **Opening Date/Time** – This is an __optional__ field. Use this field to indicate when you plan on opening the bids.
   iv. **Time Zone** – This defaults to Pacific Time. Choose another option from the dropdown if needed, otherwise leave it set to the default.

> v. **Document Title** – Enter a title for your notice describing what goods or services you are soliciting for. This is the text that the public will see when viewing a list of available opportunities to bid on, so be as specific as possible. For example, use "Frozen Peas" instead of "Invitation to Bid" or "Notice 513".
>
> vi. **Allow electronic bids?** – This field defaults to "Only Manual Bids Allowed" which means that you will not be accepting electronic bids (or eBids) submitted through the ORPIN program.
>
> vii. **Vendor Collected Administrative Fee** – Not applicable to ORCPP. Leave this field blank.
>
> viii. **Maximum # of Items to display in Item Block** – Leave this field blank.
>
> ix. Click **Next** to save and continue.

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

More Information

Delivery Information

Delivery Requirements [ ]

FOB * [▼]

Other Information

Procurement Authority Citation * [▼]

Procurement Authority Citation Comment * [ ]

Special Procurement/Exemption [▼]

Special Procurement/Exemption Citation [ ]

> i. **Delivery Requirements** – This is a required field. If you do not have delivery requirements to list, enter "N/A".
>
> ii. **FOB** – Choose your preferred Freight on Board option from the dropdown.
>
> iii. **Payment Terms** – Choose your preferred payment terms from the dropdown list.

  iv. **Procurement Authority Citation** – Choose what type of authority you are procuring under.

  v. **Procurement Authority Citation Comment** – Cite the specific rule/statute/etc. that gives you authority to perform this request.

  vi. **Special Procurement/Exemption** – Not applicable to ORCPP. Leave this field blank.

  vii. **Special Procurement/Exemption Citation** – Not applicable to ORCPP. Leave this field blank.

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

g. **Attachments** – It is not a system requirement for you to upload attachments, but it is best practice to do so. You can include specific instructions, drawings, maps, specs, etc. To add attachments to the notice, do the following:

  i. Enter an Attachment Title in the first field.

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

  iii. Choose whether the attachment it Optional for the supplier to download, Mandatory for them to download, or whether it is a document that needs to be returned with their bid/proposal.

Attachments

The maximum total file upload size per Submit is 34.80 MB

Attachment Title [ ] File [ ] Browse...

Optional
Mandatory
Returnable

Attachment Title [ ] File [ ] Browse...

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

h. **Notice Summary** – Enter a summary to explain to the supplier what you need. Be sure to include information on where the work will take place as some suppliers can only provide goods/services to certain regions in Oregon. Click **Next** to save and continue.

i. **Trailer Comments** – Enter any additional comments you want included in the bottom section of the notice. This will be visible to the suppliers. Click **Next** to save and continue.

j. **Commodity Match** – You must indicate what goods/services you are hoping to procure by selecting commodities. You can add multiple commodities to your notice by clicking on the **Save** button after each commodity. ORPIN uses your selections to match up the notice to suppliers that have these commodities listed in their profiles. Once you have finished adding commodities, click **Next** to save and continue.

  *Tip – Go to google, type NIGP codes and hit search. First result is Vendornet. Here you can input root words and then find the NIPG codes. Then in ORPIN select the radio button for NIGP and input your codes there. Hit save after adding each one until they move down into existing entries.

k. **Geographic Bid Matching** – During the registration process, ORPIN asks suppliers to indicate what regions in Oregon they can provide goods or services

   to. When you are creating your notice, you are required to pick a region so that ORPIN can match this up with supplier's profiles.

l. Click **Finish** to view the draft Notice document.

8. When you issue your Notice, ORPIN will automatically send out emails to suppliers who match the goods/services you selected and have their Email Notifications turned on. If you have a specific list of suppliers that you want to receive the notice, you can use the **Invite or Notify** option to ensure that they receive it regardless of whether their profile matches the commodities or not.

   a. Click on **Additional** in the menu bar.
   b. Select **Invited/Notified/Interested Suppliers**.
   c. The radio button will default to **Notify**.

Invite / Notify Suppliers

(?) Inviting Suppliers will result in only those Suppliers being able to see and bid on the opportunity. Notifying Suppliers does not restrict the opportunity to others.

Select an option: ○ Invite ● Notify

(Find Supplier to Notify) (Notify using distribution list) (Notify Certified Suppliers) (Notify using Previous Document)

(?) Existing Invited, Notified and Interested Suppliers

   i. **Notify** prompts ORPIN to send an email to the list of suppliers you will specify, but also publishes the Opportunity for all suppliers to view/bid.
   ii. **Invite** prompts ORPIN to send an email to the list of suppliers you will specify, but does not publish the Notice publically for other suppliers to see. This means that only those suppliers you add to the Invite list will know that this solicitation exists.

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

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

e. Type the supplier's company name in the **Supplier** field.
When the results come back, check the box next to the correct supplier.
f. Check the box next to the correct Supplier.
g. Click the **Submit** button at the top of the list. This will add the supplier to your Notify/Invite list.

h. Repeat steps d-g until your list is complete.
i. Click the **Finish** button.

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

Current Step: Creation

Integrity Check Failed

- Geographic Bid Matching Required (Location: Geographic Bid Matching)
- Closing date must be in the future. (Location: Document Information)
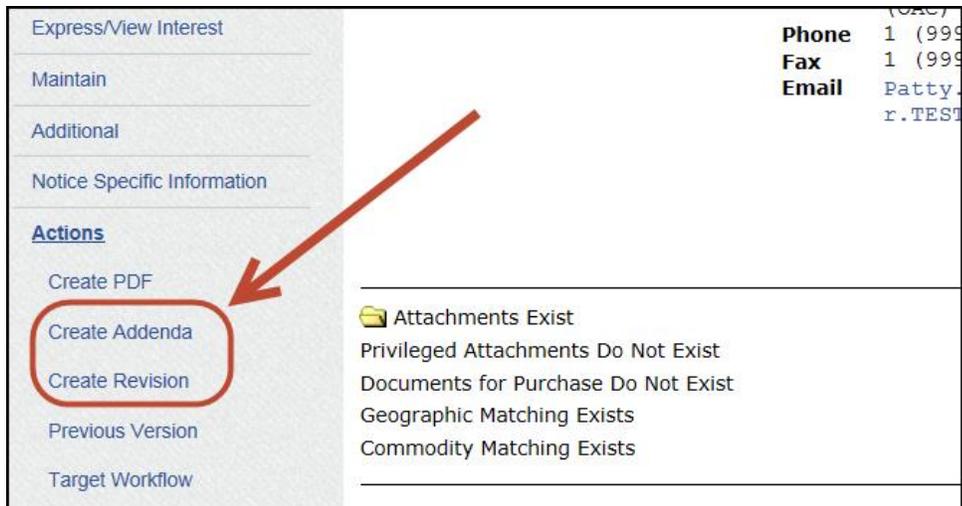
* Indicates a required field

    ii. Click on the underlined location and fill in the missing information.

    iii. Once all of the information is populated, you can click on **Complete Step (Creation)** again.

  b. Click the dropdown box and choose the name of the person who will process the next step. If you plan on completing the workflow yourself, choose your own name in the dropdown. Click **Submit**.

  c. Now click on the **Complete Step (Issue)** option in the menu bar. Confirm the closing date and time are correct, and then click **Submit**.

*Your Notice has now been issued and is public for suppliers to view. Use the **View Data** menu options to track supplier download activity and to see emails sent out by the system pertaining to your Notice.*

10. In order to make a change to a Notice that has been issued, you need to either create an Addenda or a Revision. Addenda should be used most of the time, and is for things like changing the closing date or time, updating the Summary, or adding new items. Revision can be used for smaller changes like adding a new attachment or inviting/notifying another supplier (assuming you used the Invite/Notify feature to begin with.)

  a. Open your Notice.

  b. Click on **Actions** in the menu bar.

  c. Choose either **Create Addendum** or **Create Revision**.

     d.   Confirm the closing date/time of the document.

     e.   Click **Continue** to be taken into the Document Wizard to make your changes.

     f.   Leave the words "Addendum #_" or "Revision #_" but type the reason for your addendum or revision into the box.

     g.   Change any other information that needs to be updated.

     h.   Click the **Finish** button.

     i.   Process the document through the workflow by clicking on **Complete Step** until you have issued the addendum/revision.

V.   Posting Results on a Notice:

Once the Notice is closed, if you would like to post an evaluation sheet, preliminary results, intent to award letter, or anything else for the suppliers to see, you can post it under **Notice Specific Information**.

1.   Pull up your closed Notice document.
2.   Click on **Notice Specific Information** in the left-hand menu bar.
3.   Choose the most appropriate folder to post your document in. They all function the same, (except for the Questions and Answers folder. This folder is used prior to the solicitation closing as a way to share Q&A with your interested suppliers.)
4.   Click the folder you want to use.
5.   Enter a title for the Attachment, and click the **Browse** button to locate it on your computer. If you would like the attachment to expire after a certain date, you can fill in the **Expiration** field. (This is OPTIONAL. If you do use the Expiration date, the document will no longer be visible to the public/supplier community after the specified date, but it will remain attached internally for you to see.)

3. Intent to Award

(Train)

Document Number: ODFW–1008–16 (Version: 2)   **Control Number:** 1765852

1. Questions and Answers	**Skip** **Back** **Save** **Next** **Finish**
2. Preliminary Results	**Intent to Award**
3. **Intent to Award**	**Attachment Title** [ ] **File** [ ] Browse...
4. Potential Delay Notice	**Expiration** [ ] ✋ (mm/dd/yyyy)
5. Evaluation (Competitive Range)	**Attachment Title** [ ] **File** [ ] Browse...
	Expiration [ ] ✋ (mm/dd/yyyy)
6. Email Notices	**Attachment Title** [ ] **File** [ ] Browse...

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

Skip   **Back**   **Save**   **Next**   **Finish**

Intent to Award

Attachment Title * [Intent to Award   ]   **File** * [C:\Documents and Sett] Browse...

Expiration [   ] ✋ (mm/dd/yyyy)

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

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