Proposal Procedures

Portal Procedures - Revised

March 2018

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Miscellaneous Proposals Portal Sites

1. Purpose

This section describes the content and maintenance of **Miscellaneous** portal sites on the **Proposals** portal on ddicentral.

2. Introduction

Not every request we get warrants a separate portal site. Starting in 2016, we established Miscellaneous portal sites to hold requests that are:

- Simple – essentially no original documents, no need for a full suite of portal site tabs
- Asked and answered with none or very little collaboration

Each Miscellaneous portal site holds one folder for each request. Each folder holds all of the pertinent documentation for a request or pursuit. Folder contents are easy to retrieve for reference and reuse.

3. Proposals List

Starting in July 2013, create a line on the Proposals List table for each folder in each Miscellaneous site.

- Place the folder and its contents in the appropriate Miscellaneous site.
- Do not create a separate SharePoint site for the request.
- **Add new item** to create a row on the Proposals List table as you would any other request.
- Use the URL of the Miscellaneous site where the content is stored as the **Site URL** in the Proposals List table.

  Give the hyperlink the alias *miscellaneous site name-request name*.

  For example,

  Miscellaneous Forms – AES Portland

  Miscellaneous – Clubhouse RFI

Information in the Proposals List table feeds management reports directly and through CRM.

4. Miscellaneous Site Names

Store all request folders in the **Working Drafts** tab of the Miscellaneous site.

Site Name	**Use**
Miscellaneous	University Letter of Support (LoS) One off request that does not fit another miscellaneous category
Miscellaneous Forms_Completed	Vendor questionnaire Compliance form
Miscellaneous Specs	Generic Specification

5. Annual Site-Name Update

1. Create three portal sites with the following names:

   yyyy-Forms

   yyyy-Miscellaneous

   yyyy-Specs
2. Set the due date of the current year sites to 12/31/yyyy.
3. Set the due date on each past year sites to 12/31 of that year

The current year sites sort at the top. Previous year sites sort at the end of their year.

Example: On 1/1/2016:

Site Name	**Old Due Date**	**New Due Date**
2015-Miscellaneous	12/31/2015	12/31/2015
2016-Miscellaneous	NA	12/31/2016

This keeps the most current miscellaneous sites at the top, current pursuits near the top, past miscellaneous sites sorted by due date with other pursuits.

6. Pertinent Documentation

Save the following in the folder for the request:

- Initial request - attachment or the email if there is no attachment
- Final deliverable – completed form or letter or spec or other document sent to fulfill the request.
- Other items worth saving – use your judgment

7. Migrating a Folder to a Portal Site

This is a judgment call. The spirit of the Miscellaneous folders is simplicity. If a request requires collaboration or multiple portal tabs, consider transferring the contents to a new SharePoint site.

Change the Site URL that is on the Proposals List table to point to the new portal site.

Delete the folder from the Miscellaneous folder.

Creating a Site for a New Proposal

1. Purpose

This procedure documents the process to follow to set up a site for a new request to the Proposals group.

We create a SharePoint site for each request that we work on. The Proposals team and authorized participants in the proposal response use the site to track activity, share content, and work collaboratively to fulfill the request.

2. Summary

Creating a portal site involves these activities:

- Determine what type of request
- Gather information
- Create site
- Grant permissions to the site
- Log request in proposals list and update the calendar
- Notify the sales rep

3. Before You Start

3.1. Tools

You need **Snag-it** for taking screen captures of the customer logo. Download a licensed copy from raid5berry or a free 30-day trial from techsmith.com.

3.2. Types of Requests

Type	Description	Number Range
Request for Proposal (RFP) Request for Quotation (RFQ) Invitation for Bid (IFB) Request for Tender (RFT)	Invitation for suppliers to submit a proposal on a specific commodity or service. Alerts suppliers that the selection process is competitive. Often part of a bidding process. Brings structure to the procurement decision. Allows the risks and benefits to be identified clearly upfront.	P50

Request for Information (RFI)	Process to collect written information about the supplier capabilities. Often used as a solicitation sent to a broad base of potential suppliers. Normally follows a format that can be used for comparison. Primarily used to gather information to help make a decision on next steps. Seldom the final stage; used in combination with RFP, RFT, RFQ	P40
Everything Else	Questionnaires	P30

3.3. Gather Information

Use the **Site Request Checklist** to help make this easier:

DDI Sample Hyperlink

Site Request Checklist .doc

3.3.1. Gather the following from the email request:

- Customer Name[1]
- Project Name
- Due Date
- Location
- Sales Contact
- Industries
- Partner, Customer, Customer's Reference #, CRM info (optional)
- Request Type
- Deliverable
- Date Received

3.3.2. Gather the following from the request or through an Internet search:

- Customer Web site URL
- Location (City, State for US or City, Country for international opportunity)

3.3.3. Gather all due dates referenced in the request including:

- questions are due

[1]If there is a previous project for the same customer, use the same name. It makes it easy to find all requests for the customer.

- answers to questions will be received
- response is due (Note: in some instances there is one due date for electronic responses and one for hard copies. In this scenario, both dates should be entered.)
- for vendor presentations
- short list is decided on
- vendor is notified of win/loss

You will enter these dates into the Proposals Calendar.

3.3.4. Create the following:

- New folder in Windows Explorer

  You use the folder as a temporary repository for the documents that you upload to the request site.

- Name the folder the name of the proposal

3.3.5. Save All Original Documents to Windows Explorer

- Save all of the original documents that come with the request in the Windows Explorer folder.
- Save documents that pertain to the proposal that you receive after the original request in the Window Explorer folder.

3.3.6. Get the Customer Logo

- We save the customer logo on the proposal site to decorate the site and to give us a visual clue when we are on the site. You must save the logo in the **Original Documents** folder of the request site.
- Sometimes the logo is on the cover page or the header or footer of the request. The logo is usually available on the customer home site. Use Snag-it or another screen capture program to copy it. The Snag-it **Object** profile sometimes works. The **Region** profile always works.
- You must name the logo **Logo.gif**. The SharePoint program looks for the name Logo.gif with a capital L and file type gif in the Original Documents folder.

3.3.7. Assign the Reference ID#

1. Determine the request type.
2. Start at Proposals home page.
3. Click the **ID #** drop down arrow.
4. Scroll to find the highest existing number for the request type.
5. Increment by one.

Always preface with the number range identifier. The format of the reference ID is P##,

where ## = 50 for RFP

40 for RFI

30 for questionnaires

6. Note the ID#. You will use it in Steps.

3.3.8. Determine Who Gets Permission to Update Content on the Site

This procedure gives all SharePoint users Read-Only access to portal sites by default. Who should get Contribute permission, which permits check out, edit, and check in is somewhat subjective. Always give the sales rep Contribute permission. Consider giving Contribute permission to anyone included on the CC: of the email from the sales rep including SMEs and management that might need to comment to the response documents.

4. Steps

4.1. Create the Site

Start at Proposals home page.

1. Click **Site Actions > New Site > Blank & Custom >Proposals > More Options**.
2. Complete the following:

   Title

   The syntax for the title is ReferenceID#_Company Name, for example:

   `P50-137_SFWMD`

   For odd projects like Round 2 for a previous proposal, add in a distinguisher such as `P50-137_SFWMD-Round2`.

   Description

   This field is optional but it's a good idea to use it. It helps to distinguish sites when we have multiple proposals for a single company.

   URL Name

   The proposal number, for example, `P50-137`

3. Select **Use same permissions as parent site**.

This is the default. It populates the default list of users and permissions to the site.

4. Click **Create**. Wait.

   This might take a minute or two. This opens a new web page for the project.

4.2. Update the Site Look and Feel

Start at the request site.

1. Click **Site Actions > Site Settings >Manage Site Features > DataDoctorInfo Teamsite look and feel**.
2. Deactivate.
3. Activate.

   The updated look and feel has a lighter colored header and the page-title is a link to the request site home page.

4. Click the request site title.

   This returns you to the request site home page.

4.3. Save the Original Documents

Start at the request site.

1. Click the **Original Documents** tab.
2. Click **Add document**.
3. Upload each document individually.

   This allows us to track and retrieve each document independently of the others.

   Note: The completed Questionnaire goes into the **Related Information** tab. Modifications to the original documents go into the **Working Drafts** tab.

4.4. Save the Customer Logo and Link

Start at the request site.

1. Save **Logo.gif** to the **Original Documents** tab.

   This replaces the DataDoctorInfo logo on the request site with the customer logo.

   The logo must have the name **Logo.gif**. You must save the logo to the **Original Documents** tab. If the customer logo does not replace the DataDoctorInfo logo, correct the file name and save **Logo.gif** to the correct tab.

2. Copy the link from the customer Web site.

3. Click **Add new link**.
4. Add the link.

4.5. Grant Permission to the Request Site

Start at the request site.

1. Click **Site Actions > Site Permissions**.
2. Click the **Stop Inheriting Permissions** icon.
3. Click the **Grant Permissions** icon.

   This opens the **Grant Permissions** window.

4. Add users in the Users/Groups text box.
5. You can use the Check Names icon to verify names.

   You can click the Browse icon to find people and names.

   Select **Grant users permissions directly**.

   Select **Contribute – Can view, add, update, and delete**.

6. Deselect **Send welcome e-mail to the new users**.
7. Click **OK**.

   You can check permissions before you proceed.

8. Click the request site title.

   This returns you to the request site home page.

5. Add the request to the Proposals List

Start at the Proposals home page.

1. Click **Add new item**.

   This opens a page.

2. Complete the following:

   ID#

   Customer[2]

   Due

   Site URL

   Sales Contact (can have multiple entries)

   Pursuit Lead (can select multiple entries)

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[2] If there is a previous project for the same customer, use the same name. It makes it easy to find all requests for the customer.

Project

Industry (can select multiple entries)

Location

Partner (if applicable)

Customer's Ref # (if applicable)

CRM (if applicable)

Request Type

Status (defaults to In Progress)

Status Notes (if applicable)

Region

Year

3. Click **Save**.

This returns to the Proposals home page. The request information is in the table, sequenced by due date.

You can make changes to any of the fields in the table.

6. Add the Request to the Proposals Calendar

Start at the Proposals home page. Repeat these steps to enter each of the relevant dates for this proposal to the calendar:

1. Hover over the due date until **+Add** appears.
2. Click **Add**.
3. Complete the following:

   Title

   Dates – Enter the local (Pacific) date and time that the response is due in both the **Begin** and **End** fields.

   Description – Enter the delivery information, including contact person, physical and electronic addresses, and form of response.

4. Click **Save**.

7. Notify the Sales Rep that a Proposal Site Has Been Created

There are three standard emails to tell the sales rep that a site has been created:

Email	**Usage**
Site Created	You create the site but are not assigned to the pursuit
Site Created What to Expect	You create the site and are assigned to the pursuit
Proposals – What to Expect	You are assigned to a pursuit after the site is created

The draft emails are on the For Proposals Only page.

To send an email:

1. Double-click to **Open** the email.
2. Fill in the addressees. Include everyone with Contribute permission.

   Note that the email is from Proposals and that Rena is already copied.

3. Fill in the blanks and edit the email to include situation-specific content.
4. Send a prompt, courteous reminder email if you do not receive the completed questionnaire as you request.

Creating a Secure Site for a new Proposal

1. Purpose

This procedure documents the process to follow to set up a secure site for a new request to the Proposals group. The secure site allows access to authorized individuals only who personally have signed a NDA. The creator of the proposal does not have access to the site if her name is not on the list of authorized individuals. Members of the SharePoint Team have access to the site and must sign the NDA.

2. Summary

This procedure is very similar to the Creating a Site for a new Proposal procedure, and includes two additional steps.

- You must use unique permissions when you create the site.
- You must grant proposal ownership explicitly to the person responsible for maintaining the site.
- Gather all information that you would for any proposal site.
- Get the names of all the authorized individuals.
- Create site. Select Use unique permissions. **(New step)**
- Grant permissions to the site.
- Grant Proposals Owners permission to the person who maintains the site. **(New step)**
- The proposal owner must:
  - Save Original Documents to the Request SharePoint Site
  - Update the Site Look and Feel
  - Add Request Dates to the Proposals Calendar
  - Update the Proposals List

Only the proposal owner can access the site from the Proposals List.

3. Steps that are Different

4.1 Create the Site

Start at Proposals home page.

1. Click **Site Actions > New Site > Blank & Custom >Proposals > More Options**.
2. Complete the following:

   Title

   The syntax for the title is ReferenceID#_Company Name, for example:

   `P50-137_SFWMD`

For odd projects like Round 2 for a previous proposal, add in a distinguisher such as `P50-137_SFWMD-Round2`.

Description

This field is optional but it's a good idea to use it. It helps to distinguish sites when we have multiple proposals for a single company.

URL Name

The proposal number, for example, `P50-137`

3. Select **Use unique permissions**.

   This populates no users and permissions to the site. All permissions must be entered manually.

4. Click **Create**. Wait.

   This might take a minute or two. This opens a new web page for the project.

4.5 Grant Permission to the Request Site

Start at the request site.

1. Click **Site Actions > Site Permissions**.
2. Click the **Stop Inheriting Permissions** icon.
3. Click the **Grant Permissions** icon.

   This opens the **Grant Permissions** window.

4. Add users in the Users/Groups text box.
5. You can use the Check Names icon to verify names.

   You can click the Browse icon to find people and names.

   Select **Grant users permissions directly**.

   Select **Contribute – Can view, add, update, and delete**.

6. Deselect **Send welcome e-mail to the new users**.
7. Click **OK**.

   You can check permissions before you proceed.

8. Click the request site title.

4. All other site setup must be done by someone with access to the new site

- Save Original Documents to the Request SharePoint Site
- Update the Site Look and Feel
- Add Request Dates to the Proposals Calendar
- Update the Proposals List

Copying Files from Working Drafts to Final Submitted

1. Purpose

This procedure documents the process to follow to copy files from **Working Drafts** document list to **Final Submitted** document list without saving the files to your hard drive.

2. Summary

Copying files from **Working Drafts** to **Final Submitted** involves these activities:

- Open a Widows Explorer for each tab.
- Drag the documents from one folder to the other.

3. Before You Start

Open the portal site.

Determine which files to move.

4. Steps

Start at request home page.

1. Click **Team Tools > Documents > Working Drafts**. This changes the menu options under the title bar.
2. Click **Library**. This opens the library menu options.
3. Click **Open with Explorer**. This opens a Windows Explorer window that shows the files in the **Working Drafts** tab.
4. Click **Team Tools > Documents > Final Submitted**. This changes the menu options under the title bar.
5. Click **Library**. This opens the library menu options.
6. Click **Open with Explorer**. This opens a Windows Explorer window that shows the files in the **Final Submitted** tab.
7. Drag files from the **Working Drafts** folder to the **Final Submitted** folder.
8. Click the title bar to refresh the tabs.
9. Verify that the files have been moved.

[Image Removed]

4.1.1. Status

You can leave this at the default of In Progress. When the proposal status changes, (i.e. it is sent, the project gets put on hold, we no bid) this field will need to be updated.

4.1.2. Status Notes

Use this field for additional comments on the status. For example:

3/1/18 – Terri/Sue decided to no bid

4/1/18 – DDI notified short listed, final decision will be announced on 4/15/18

This field is option but should be completed when there is pertinent additional information.

4.1.3. Project

What is this proposal for, a historian, an AMI system, Condition Based Maintenance, etc.? The answer can typically be found on the cover page of the proposal and/or in the first few pages of the proposal. When in doubt use the customer's descriptions. If there is already an appropriate project description in the drop down list that appears, use that. We want to have as many of these with the same project names as possible.

Always complete this field.

4.1.4. Partner

This field is used to record all partners we are co-bidding with. This field is also used to record the partner when we are a sub to a partner and sending a response to them that they are including in a larger customer bid.

This field should be filled out whenever partners are involved in a proposal.

4.1.5. Customer Ref#

Did the customer assign a number to their proposal? If so, record it here. Occasionally it is in the header/footer of the proposal. If the customer did not assign a number, skip this field.

4.1.6. Type

What type of proposal is this: RFI, RFP, Spec, or other? This should always be filled out.

4.1.7. Type Notes

This is where you can record additional information about the type, for example, vendor prequalification questionnaire. This field is optional.

Opening an Executive Overview - Obsolete Process

Removed 10-4-2017

Check out, Check in, or Discard Changes to Files in a Proposal Site

1. Introduction

Following is a slightly modified the copy of the SharePoint help topic. Modifications reflect differences in our SharePoint implementation.

Multiple people can work simultaneously on a document.

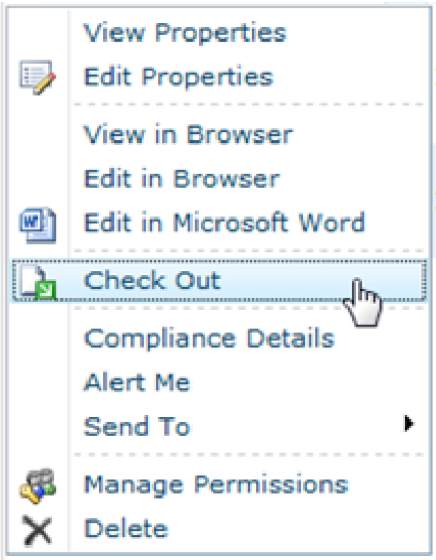
If you want to make changes to a file that resides in a proposal portal site, check the file out. That way, you can be sure that no one else can change the file while you are working on it.

When you check the file back into its site, other people can see your changes and it becomes available to them for check-out, if they have appropriate permissions. If you decide not to make or keep any changes in the file, you can simply discard your checkout so that you do not affect version history.

2. Check out a file

To check out a file from a proposal portal site:

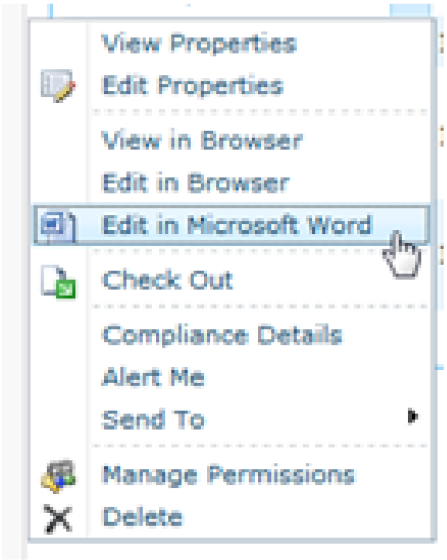
1. Navigate to the site where your file resides.
2. Point to the file name, click the drop-down arrow that is next to the file name, and select **Check Out**.



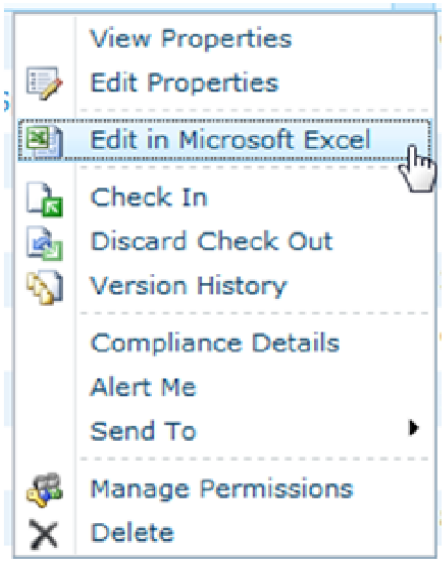
A message box opens, advising you that you are about to check out a file. If you want to save it in the folder you have designated for your local drafts, select the **Use my local drafts folder** check box.

3. Decide whether you want to save the file to your local drafts folder. Speed and portability are the advantages of saving the file to a local folder. Greater file protection is the advantage of working online. If you do not need to work offline, you might prefer to work online. If you want to save it to your local drafts folder, select the **Use my local drafts folder** check box. Otherwise, do not select the check box.

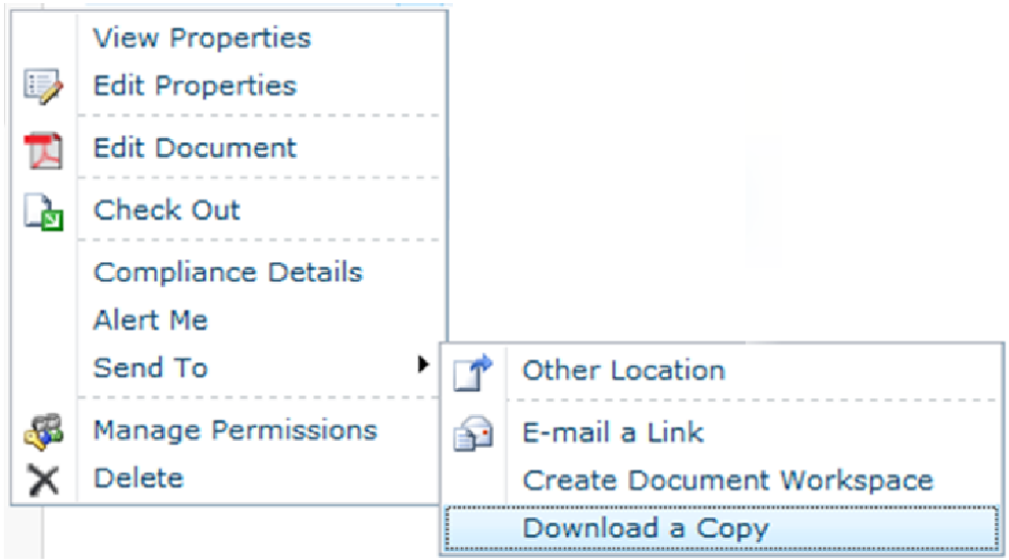
4. Point to the file name, click the drop-down arrow that is next to the file name, and select **Edit in Microsoft Word**.



If you are checking out an Excel File, select **Edit in Microsoft Excel**.



You cannot check out and edit a PDF file. You can download a copy to your computer.



5. Click **OK**.

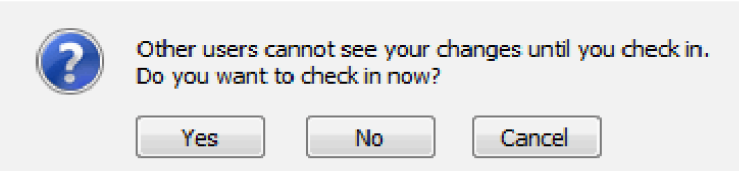
When the file is checked out, the icon next to the file name is partially covered by a green, downward-pointing arrow. This tells you, or anyone else, that the file is checked out.

3. Check in a file

Your files, and any changes you have made to them, will not be available to your colleagues until you check them back into your site.

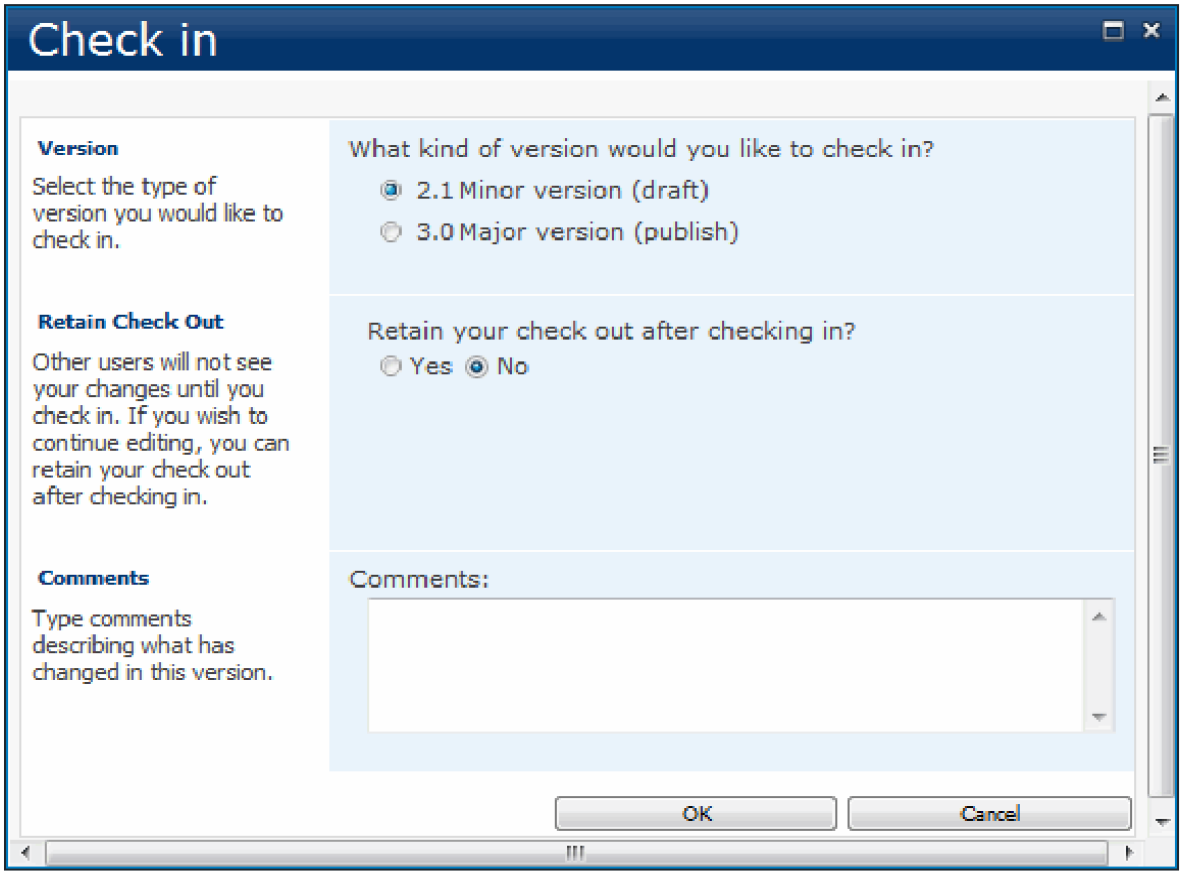
1. Close the document.

A confirmation box opens.



2. Click **Yes**.

A **Check in** message box opens.



3. Make the appropriate selection in the **Retain Check Out** area.
   - If you want to do an interim check-in and then continue working on the file, select **Yes** in the **Retain Check Out** area. An interim check-in preserves the edits that you have made so far.
   - If you are finished with your work on the file and do not need to keep it checked out, select **No** in the **Retain Check Out** area.
4. In the **Comments** area, add a comment that describes the changes you made. This step is optional but recommended as a best practice. Check-in comments are especially helpful when several people work on a file. If versions are being tracked, the comment becomes part of the version history, which may be important to you

in the future, if you need to return to an earlier version of the file for any reason.

5. Click **OK** to finish checking in the file or **Cancel** if you change your mind for some reason. The green arrow disappears from the file icon when the file is checked back in.

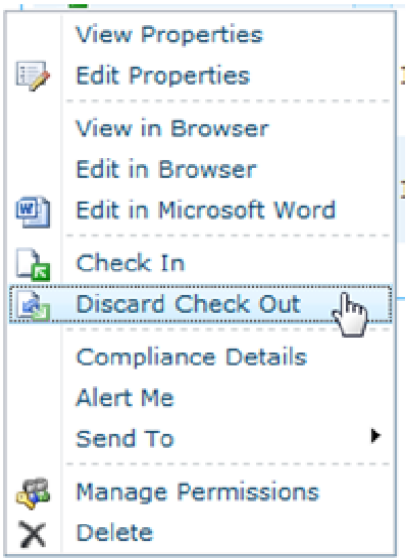
4. Discard a check-out

If you check out a file and make no changes to it, you can simply discard the checkout, rather than saving it. A new version is created each time you check a file back into the site. By discarding the checkout, you avoid making new versions when you have not made any changes to the file.

In some cases, you might make changes that you do not want to keep. Rather than saving the file, you can discard the checkout and thereby lose the changes.

To discard a check-out:

1. Navigate to the site where your file resides.
2. Choose one of the following methods for checking your file back in:
   - Point to the file, click the drop-down arrow that is next to the file name, and then select **Discard Check Out**.



3. When the **Open Document** message box announces that you are about to discard the file, click **OK** to discard the checkout, or **Cancel** if you change your mind. The green arrow disappears from the file icon when the file is checked back in.

Viewing Previous Versions for a Document

1. Introduction

Following are slightly edited copies of the SharePoint help topics.

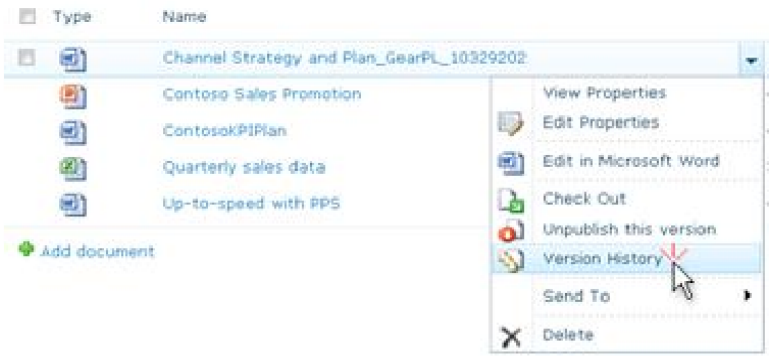
2. How does versioning work with file checkout?

When you check out a file in a versioning-enabled library, a new version is created every time you check it back in. If major and minor versions are part of the configuration of your library, you can designate, at check-in, which type of version you are checking in. In libraries where check-out is required, versions are only created upon check-in.

3. View version history within the library or list

You can view the version history of any item or file in any list or library. The version history contains information about when the item was changed, who changed it, and comments written by the people who made changes.

1. Navigate to the list or library that contains the item or file you want to explore.
2. Hover over the item or file for which you want to view the history, click the arrow that appears, and select **Version History** from the drop-down list.



The **Version History** dialog box opens.

[Image Removed]

1 The most recent minor version

2 A comment left by the last person who checked in the file.

3 The first version of the file. The first version is always numbered 1.0.

3. To view a particular version of a file click the one that interests you. The item or file opens up in a separate window where you can view it.
4. Close the item or file when you have finished viewing it.

5. To return to your list or library, close the **Version History** dialog box.

4. Restore a previous version

If you prefer an older version of an item or file, you can select the older version and "restore" it so that it becomes the current version.

1. Navigate to the list or library where your item or file is located.
2. Hover over the item or file for which you want to manage versions until you see a drop-down arrow.
3. Click the drop-down arrow and select **Version History**.
4. Hover over the version that you want to restore until you see a drop-down arrow.
5. Click the drop-down arrow and select **Restore**.

   [Image Removed]

6. When you are prompted to confirm the restoration as your current version, click **OK**.

5. Delete a previous version

Note: This procedure should only be used in the event that the current version of the document becomes corrupted. Otherwise, all version history should be retained.

If you want to make sure that no one can read a version that has inaccurate or otherwise troublesome information, you can delete it.

1. Navigate to the list or library where your item or file is located.
2. Hover over the item or file for which you want to manage versions until you see a drop-down arrow.
3. Click the drop-down arrow and select **Version History**.
4. Hover over the version that you want to delete until you see a drop-down arrow.
5. Click the drop-down arrow and select **Delete**.

   [Image Removed]

6. When you are prompted to confirm the deletion, click **OK**.

When you delete a version, it is sent to the **Recycle Bin**, where you, or another person who has the necessary permissions, can recover it. If you do not see the **Recycle Bin** on your site, your server administrator might have disabled it.

Uploading Items

1. Purpose

This procedure documents the process to follow to store items to a request site. The item can be of any type that SharePoint supports including documents, spreadsheets, .pdf files, Visio, and email.

We store documents to the request site as a historical record and to make them available for collaborative use.

2. Summary

Storing an item on the request site involves browsing to the document and saving it. The process is the same regardless of the type of item you are uploading.

3. Before You Start

Save the item to a folder in the Windows Explorer.

Note the location where you stored the item.

4. Steps

1. Start at the home page of the request site.
2. Click the tab where the item will be stored.
3. Click **Add document**.

   This opens the Upload Document dialog box.

4. Browse to the file you are uploading.
5. Click OK.

   This opens the Original Documents dialog box.

6. Click Save.

   You can change the contents of fields before you save. You see the changed content on the tabs.