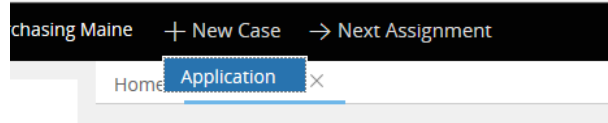


HOW TO DO A WCB DOCUMENT

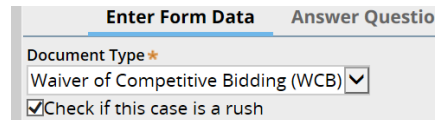
- 1) Log into the Purchasing Me application
- 2) Click on new case and then application



You will see that a case number is established for your document; in this case it is PM-1892. Your case number will be located next to “Purchasing Maine” in the upper left-hand corner of your case.



- 3) Fill out the following fields:
 - a. Document Type (Choose “Waiver of Competitive Bidding (WCB)”)
 - b. Department (select your department by putting in either your agency number or department name.)
 - c. If applicable you can check the “Check if this case is a rush” button

A screenshot of the "Enter Form Data" section of the application. It shows a dropdown menu for "Document Type" with "Waiver of Competitive Bidding (WCB)" selected. Below the dropdown, there is a checkbox labeled "Check if this case is a rush" which is checked.

- d. Short Description of Goods or Services (use drop down to select your service)
POINT OF INFORMATION - WHEN PICKING YOUR SERVICE, IF YOU DO NOT SEE ANY SERVICE LISTED THAT WOULD APPLY TO THE SERVICE YOU ARE OBTAINING, THEN SELECT “Other” AND DIRECTLY ACROSS, A FIELD WILL APPEAR WHERE YOU CAN ENTER IN THE SERVICE.
- e. Contractor Name (enter in your vendor name)
- f. Select your Contract Start Date and Contract End Date by using the drop-down feature or by using the date icon
- g. Advantage CT or RQS Number (enter in the Advantage number associated with the BP37WCB) **Please put the entire number in this field – you can copy the Advantage number by highlighting it using (ctrl C) and paste into the Purchasing ME case field by using (ctrl V). Sample 2016100500000001221. If you do not know yet what your CT will be – enter in all zeros.**

- h. Internal Department Contract Number (optional only if applicable to your agency)
- i. Under “What is the dollar amount of the contract?” (enter in the amount of the contract)

Purchasing Maine (PM-1892) Save draft Other actions Discard Case

Enter Form Data Answer Questions Upload Documents

Document Type * Waiver of Competitive Bidding (WCB) Department * 01A - Department of Agriculture, Conservation and Forestry

Short Description of Goods or Services * Conservation Services

Contractor Name * ABC Conservation Inc

Contract Start Date * Jan 24 2017

Contract End Date * Mar 30 2017

Advantage CT or RQS Number 2016100500000001221

Internal Department Contract Number

What is the dollar amount of the contract? If this is an amendment, enter only the amendment amount. * \$65,000.00

Next >>

NOW CLICK THE “Next” BUTTON

- 4) You will now be at the Answer Questions page. For this type of document there will be no questions to answer – it will just simply tell you what form to use. You can now click on the Next button.

Purchasing Maine (PM-1892) Save draft Other actions Discard Case

Enter Form Data Answer Questions Upload Documents

There is no additional information required for your submittal. Please select "Next" to upload your Waiver of Competitive Bidding document.

<< Back Next >>

- 5) You will now be at the Upload Documents Page where it will instruct you on what documents you will need to attach.

NOTE: Please keep the file names of attachments to less than 64 characters AND with no special characters

Enter Form Data Answer Questions **Upload Documents**

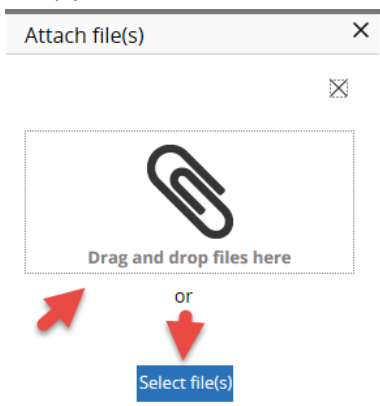
Before uploading any documents, ensure that you have all necessary signatures for each document.

You are required to submit the following documents:

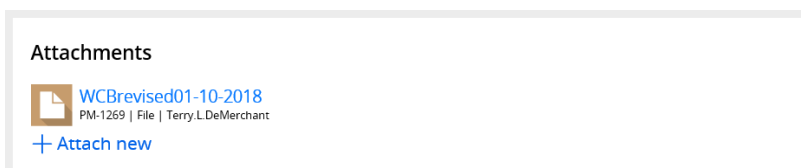
You have indicated that you would like to submit a WCB document. Please upload the document as an attachment below.



- 6) YOU CAN CHOOSE TO EITHER DRAG AND DROP YOUR FILE OR TO CLICK ON “Select File(s)”

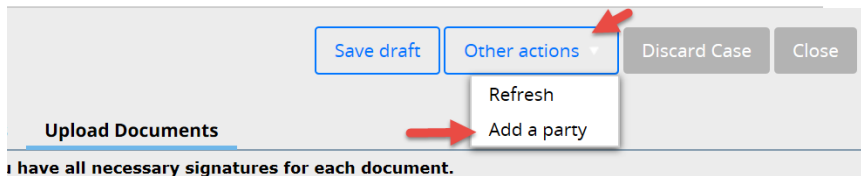


For this exercise I’m going to click on “select file(s)” which you would then find and select your documents to attach:

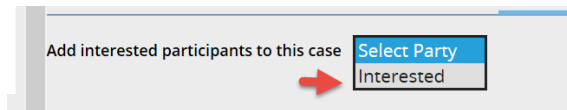


OPTIONAL FEATURE

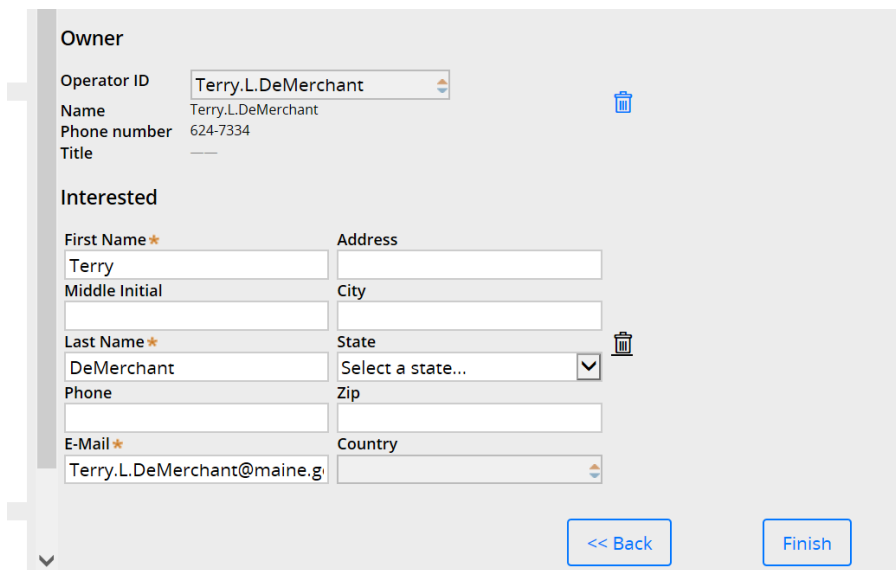
- 7) There is an “Add a party” feature that will allow you to put in a member of your workgroup so that they will receive all notification e-mails that you do. In the upper right, click on the Other actions button and choose Add a party



Under Select Party choose Interested

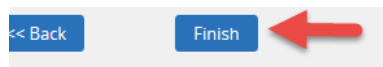


The page will open up where you can add the First Name, Last Name and E-mail. When done you would click on the Finish button.



A screenshot of a software interface showing a form for adding a party. The form is divided into two sections: 'Owner' and 'Interested'. The 'Owner' section has fields for 'Operator ID' (Terry.L.DeMerchant), 'Name' (Terry.L.DeMerchant), 'Phone number' (624-7334), and 'Title'. The 'Interested' section has fields for 'First Name' (Terry), 'Middle Initial', 'Last Name' (DeMerchant), 'Address', 'City', 'State' (Select a state...), 'Phone', 'Zip', 'E-Mail' (Terry.L.DeMerchant@maine.g), and 'Country'. At the bottom right of the form, there are two buttons: '<< Back' and 'Finish'.

You are all set to click the “finish” button



8) You will then see the status of submitted, which means it has routed to the Division of Procurement Services and the case is closed to you for editing.

The screenshot displays a web interface for case management. At the top, there are tabs for 'Overview', 'Information', 'Attachments', 'Tools', and 'Audit'. The 'Overview' tab is selected. Below the tabs, the 'Case details' section is visible, containing a grid of information: Case ID (PM-1892), Urgency (10), Status (Submitted), Created (6 minutes ago), Goal (2 days 23 hours from now), Last Update (less than a minute ago), Created by (Terry.L.DeMerchant), and Deadline (7 days from now). The 'Last Updated By' is also Terry.L.DeMerchant. A red arrow points to the 'Submitted' status. Below this is the 'Case information' section, which includes a 'Enter Form Data' area with fields for Document Type (Waiver of Competitive Bidding (WCB)), Short Description of Goods or Services (Conservation Services), and Contractor Name. A Department field is also present, showing '01A - Department of Agriculture, Conservation and Forestry'. At the bottom, a progress bar shows the following steps: 'Submit Application' (completed, green), 'Assign' (current step, blue), 'Review', 'Disposition', 'Finalize', and 'Show all steps'.

Please keep in mind that when we receive the WCB it will have to be posted for the required 7 days (except for emergency/invoice ones). The case will not be final on our end until the posting days expire, and then we will approve the case.