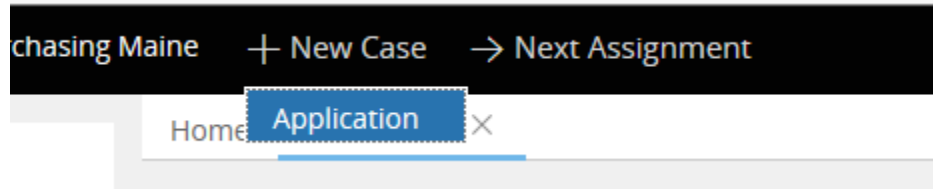


HOW TO DO A BP37WCB DOCUMENT

1) LOG INTO THE PURCHASING ME APPLICATION

2) CLICK ON NEW CASE AND THEN APPLICATION

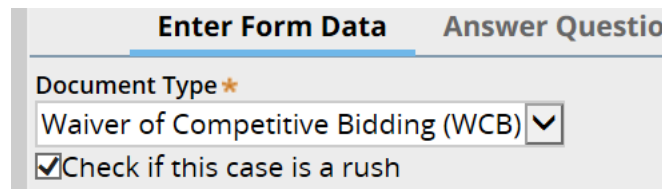


YOU WILL SEE THAT A CASE NUMBER IS ESTABLISHED FOR YOUR DOCUMENT; IN THIS CASE IT IS PM-1892. YOUR CASE NUMBER WILL BE LOCATED NEXT TO “PURCHASING MAINE” IN THE UPPER LEFT HAND CORNER OF YOUR CASE.



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 a form titled 'Enter Form Data'. The form has two tabs: 'Enter Form Data' (active) and 'Answer Questions'. Under the 'Enter Form Data' tab, there is a 'Document Type' dropdown menu with 'Waiver of Competitive Bidding (WCB)' selected. Below the dropdown 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

- 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)

NOW CLICK THE “Next” BUTTON

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

Enter Form Data Answer Questions Upload Documents

Document Type* Department*

Short Description of Goods or Services*

Contractor Name*

Contract Start Date* Contract End Date*

Advantage CT or RQS Number Internal Department Contract Number

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

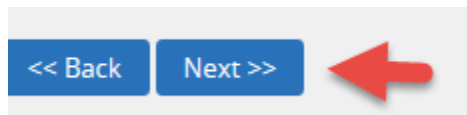
Next >>

- 4) THE NEXT PAGE WILL INFORM YOU THAT NO ADDITIONAL INFORMATION IS NEEDED AND TO SELECT NEXT TO UPLOAD YOUR WCB DOCUMENT

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

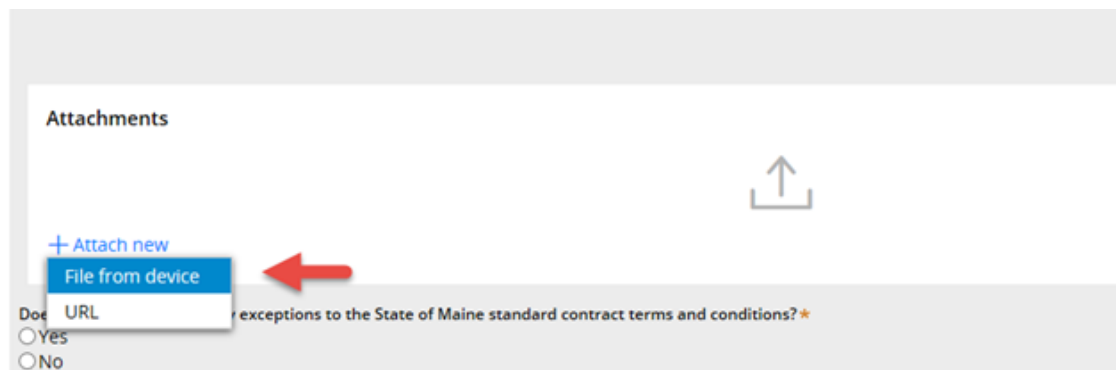
Answer Questions Enter Form Data Upload Documents

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

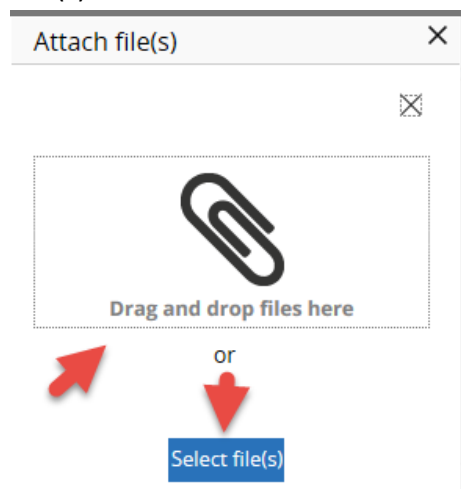


- 5) THIS NEXT PAGE IS WHERE YOU WOULD ATTACH YOUR BP37 SUPPORTING DOCUMENT
– CLICK THE ATTACHMENT BUTTON, THEN SELECT ATTACH FILE

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



- 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 DOCUMENT AND ATTACH

Name	Date modified	Type	Size
AWARD NOTIFICATION LETTERS.docx	11/1/2016 3:35 PM	Microsoft Word D...	13 KB
BP18.doc	10/27/2015 2:07 PM	Microsoft Word 9...	174 KB
BP37AM.doc	9/25/2015 9:37 AM	Microsoft Word 9...	46 KB
BP37CA_Competitive_Award_Authorizati...	11/17/2015 9:05 AM	Microsoft Word 9...	57 KB
BP37PA_Participating_Addendum_Autho...	2/26/2016 11:10 AM	Microsoft Word 9...	50 KB
BP37TEMP.doc	10/8/2015 3:12 PM	Microsoft Word 9...	86 KB
BP37WCB.doc	7/13/2016 1:30 PM	Microsoft Word 9...	81 KB

Name	File	Category
<input type="text" value="BP37WCB"/>	BP37WCB.doc	File <input type="button" value="Select"/>
<input type="button" value="Cancel"/>		<input type="button" value="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

<input type="button" value="Save draft"/>	<input type="button" value="Other actions"/>	<input type="button" value="Discard Case"/>	<input type="button" value="Close"/>
Upload Documents			

I have all necessary signatures for each document.

Under Select Party choose Interested

Add interested participants to this case	<input type="button" value="Select Party"/>
	<input type="button" value="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.

The screenshot shows a registration form with two main sections: 'Owner' and 'Interested'.
Owner Section:
Operator ID: Terry.L.DeMerchant (with a dropdown arrow)
Name: Terry.L.DeMerchant (with a trash icon)
Phone number: 624-7334
Title: _____
Interested Section:
First Name *: Terry
Middle Initial: _____
Last Name *: DeMerchant
Phone: _____
E-Mail *: Terry.L.DeMerchant@maine.g (with a dropdown arrow)
Address: _____
City: _____
State: Select a state... (with a dropdown arrow and trash icon)
Zip: _____
Country: _____
At the bottom right, there are two buttons: '<< Back' and 'Finish'.

8) ONCE YOU SEE THAT YOUR DOCUMENTS ARE ATTACHED, YOU CAN PROCEED TO CLICK "Finish" TO COMPLETE YOUR SUBMISSION.

The screenshot shows the 'Attachments' section of the form. It displays one attached document: 'BP37WCB' with a Word icon, 'PM-1892 | File | Terry.L.DeMerchant', and a trash icon. Below the attachment is a text area labeled 'Notes, comments, or questions to add to your submittal.' At the bottom, there are two buttons: '<< Back' and 'Finish'. A red arrow points to the 'Finish' button. In the bottom right corner, there are small icons for help and a user profile.

9) YOU WILL THEN HAVE NOTIFICATION THAT YOUR APPLICATION HAS BEEN SUBMITTED TO THE DIVISION OF PURCHASES AND THE CASE IS NOW 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. 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. The Department is listed as 01A - Department of Agriculture, Conservation and Forestry. At the bottom, a progress bar shows steps: Submit Application (green with a checkmark), Assign, Review, Disposition, Finalize, and Show all steps. Red arrows point to the 'Status Submitted' and the 'Submit Application' button.

YOU WILL ALSO SEE THAT THE BUTTON OF THE PAGE Submit Application IS IN GREEN AND CHECKED.

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.