



Colorado Springs Utilities  
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# Supplier Day 2022

May 3, 2022

# Presentations Agenda

## Colorado Springs Utilities - Supplier Day 2022 Agenda

Start	Finish	Duration	Agenda Item	Presenter
7:00	8:30	1:30	Check-In / Networking Breakfast	
8:30	8:45	:15	Supplier Day Welcome & Agenda Review	Mike Francolino Chief Customer and Corporate Services Officer
8:45	9:00	:15	CSU Board Welcome	Yolanda Avila Board Member
9:00	9:45	:45	Capital Programs Overview	Lisa Barbato Chief System's Planning & Project Officer Joe Awad General Manager-Planning and Engineering
9:45	10:30	:45	Technology Program Overview	Larry Dunn General Manager - Information Technology
10:30	10:45	:15	Break	
10:45	11:30	:45	Operational Program Overview	Somer Mese General Manager - Operations
11:30	12:00	:30	Procurement Overview	Rich Norton Interim General Manager - Supply Chain
12:00	12:15	:15	Final Comments	Mike Francolino Chief Customer and Corporate Services Officer
12:15	1:00	:45	Lunch	
1:00	3:00	2:00	Breakout Sessions	Heritage, Learning Center and Carson Rooms



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# **Yolanda Avila**

**Colorado Springs Utilities Board Member  
District 4 and Event Sponsor**



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# **Joe Awad**

## **General Manager Planning & Engineering**

### **Capital Programs Overview**

# Capital Programs Overview

- SPP Division Organization
  - Systems Planning & Projects (SPP) Division
  - Engineering & Project Management across all four service lines (Electric, Gas, Water, Wastewater), and Technology projects.
  - Orchestrate expenditure of Capital Improvements for Colorado Springs Utilities
- Projected 5-year capital expenditures are roughly \$400M annually

Service	Project Name	Contract Value	Engineering	Specialty Services	Surveying	Civil	Structural	Concrete / Masonry	Materials Fabrication	Process / Mechanical	Building / Mechanical	Electrical	Instr. & Control	2022			2023			
														Q2	Q3	Q4	Q1	Q2	Q3	Q4
electric	Flying Horse Substation Series Reactor - Design	*	•											IFB						
	Flying Horse Substation Series Reactor - Construction	\$				•	•					•			IFB					
	Central Substation - Design	\$	•	•	•	•	•					•	•	RFP						
	Central Substation - Construction	\$\$\$\$				•	•	•	•		•	•	•					RFP		
	Fuller Substation - Construction	\$\$				•	•	•	•				•	•	RFP					
	Kettle Creek Substation Expansion - Construction	\$\$				•	•	•	•							RFP				
	Nixon Substation Equipment Replacements	\$\$				•		•									RFP			
	Green Mountain Substation - Construction	\$\$				•	•	•	•	•	•						RFP			
	Claremont Substation - Construction	\$\$				•	•	•	•				•	•					RFP	
	URP-010 Overhead Conversion (Downtown)	\$\$											•					RFP		
	URP-004 Overhead Conversion (Academy Boulevard South)	\$\$											•					RFP		
	URP-023 Overhead Conversion (Pikes Peak and Institute)	\$\$											•						RFP	
	600A Line Extension Briargate Pkwy to Black Forest Rd	\$							•				•		RFP					
	600A Line Extension Briargate Pkwy across Woodmen	\$							•				•			RFP				
	600A Line Extension Banning Lewis Pkwy Dublin to Stetson Hills	\$							•				•			RFP				
	600A Line Extension Marksheffel to Meadowworks	\$							•				•		RFP					
	600A Line Extension Marksheffel to Kenosha Cowpoke Rd	\$							•				•			RFP				
600A Line Extension Dublin from Banning Lewis Pkwy to City Limit	\$							•				•				RFP				

Procurement Execution

Open solicitation estimated contract value : \$: 100K-1.5M    \$\$:1.5M-10M    \$\$\$:10M-20M    \$\$\$\$:>20M

Sourced to firms with Master Services Agreements, estimated task order value : \* 0-100k    \*\* 100-250k    \*\*\* 250-400k    \*\*\*\* >400k

Service	Project Name	Contract Value	Engineering	Specialty Services	Surveying	Civil	Structural	Concrete / Masonry	Materials Fabrication	Process / Mechanical	Building / Mechanical	Electrical	Instr. & Control	2022			2023			
														Q2	Q3	Q4	Q1	Q2	Q3	Q4
electric	600A Line Extension Banning Lewis Pkwy Dublin to Stetson Hills	\$						•				•				RFP				
	600A Line Extension Banning Lewis Pkwy Stetson Hills to Barnes	\$						•				•				RFP				
	600A Line Extension Stetson Hills from Banning Lewis Pkwy to Hwy 24	\$						•				•				RFP				
	600A Line Extension Briargate Pkwy to Black Forest Rd	\$						•				•				RFP				
	600A Line Extension Marksheffel Rd Drennan to Bradley	\$						•				•				RFP				
	Sante Fe Feeder Extension	\$						•				•				RFP				
	Patty Jewett Feeder Extension	\$						•				•				RFP				
	Fiber Make Ready Pole Replacement	\$										•			RFP					
	Century Link Pole Replacement	\$										•		RFP						
	Reject Wood Pole Replacement	\$										•		RFP						
	CSP Transformer Replacement Program	\$										•				RFP				
	Cable Replacement Program	\$										•				RFP				
	Streetlight Replacement Program	\$										•				RFP				
	Fuseless Transformer Replacement Program	\$										•				RFP				
	Underground System Inspection	\$										•				RFP				
	Wood Pole Inspection and Testing Program	\$										•				RFP				
	Steel Structure Inspection and Testing Program	\$										•				RFP				
	Electrification Study (space/water heating)	\$\$		•	•											RFP				

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Gas	MAOP SAA development	**	•	•										RFP		IFB			
	MAOP In-Situ Material Verification (ILI & Others)	\$\$	•	•												RFP			IFB
	MAOP Destructive Testing	**	•	•												RFP		IFB	
	MAOP Follow-Up Records Remediation	***	•	•											RFP		IFB		
	Hydrogen Blending Analysis	\$\$	•	•											RFP		IFB		
	Orifice Analysis	\$	•	•												RFP		IFB	
	Decarbonization Pathways for LDC	\$\$	•	•											RFP		IFB		
	Mesa to Manitou Phase 5 Gas Main Renewal Construction	****				•									RFP				
	Mesa to Manitou Phase 4 Gas Main Renewal Construction	****				•												IFB	
	Gate Station Over Pressure Protection Design	***	•	•	•										IFB				
	Gate Station Over Pressure Protection Construction	\$\$				•	•	•		•	•	•	•		RFP				

Procurement Execution

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Proposed projects subject to appropriation of budget



Service	Project Name	Contract Value	Engineering	Specialty Services	Surveying	Civil	Structural	Concrete / Masonry	Materials Fabrication	Process / Mechanical	Building / Mechanical	Electrical	Instr. & Control	2022			2023			
														Q2	Q3	Q4	Q1	Q2	Q3	Q4

Water	FLYR5 Valve Vault Replacement	\$	•		•	•	•	•	•			•	•						IFB		
	FVA Terminal Tank Rehabilitation - Construction	\$\$		•			•					•							IFB		
	Tollefson WTP Contact Time Improvements Design	\$	•		•	•	•			•	•	•	•			RFP					
	Tollefson WTP Contact Time Improvements Construction	\$\$		•	•	•	•	•		•		•	•							RFP	
	Highline Transmission Main Segment 1 Final Design	**	•		•	•											RFP				
	Highline Transmission Main Segment 1 Construction	\$\$			•	•		•		•		•	•								RFP
	Highline Transmission Main Segment 2 Final Design	**	•		•	•													RFP		
	Highline Pump Station Final Design	\$	•	•	•	•	•	•	•	•	•	•	•							RFP	
	FVA Surge Tanks 1 & 2 Design	**	•	•				•											IFB		
	Academy and Meadowland Design	***	•	•	•	•	•	•		•		•	•				RFP				
	Broadmoor 4 Tank Rehabilitation - Construction	\$\$		•			•					•			IFB						
	Wilson Tank Replacement - Construction	\$\$		•	•	•	•	•	•	•		•	•		RFP						
	Cedar Heights Tank 3 Rehabilitation - Construction	\$		•			•					•								IFB	
	Mesa WTP Site Restoration/Landscaping - Construction	\$		•													RFP				
Homestake Outlet Channel Rehabilitation-Construction	\$					•	•	•	•							IFB					

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														Q2	Q3	Q4	Q1	Q2	Q3	Q4
Water	Homestake Operator Housing Replacement-Construction	\$									•	•			IFB					
	Homestake Arkansas River Diversion Slide Gates Replacement- Const.	\$						•		•					RFP					
	Twin Lakes Redundant Main Line Valve- Construction	\$					•	•		•					RFP					
	Hancock Expy 16"-24" Water Pipeline Replacement	\$\$		•	•	•									IFB					
	Broadmoor Valley / Regency Dr Water Pipeline Replacement	\$\$		•	•	•												IFB		
	Tudor Rd Class III Water Main Lining Rehabilitation Project	\$		•	•	•										RFP				
	Circle Drive Bridge Replacement (16" W)	\$\$																		
	URP-010 (Downtown)	\$\$				•										RFP				
	URP-004 (Academy Boulevard Reconstruction South)	\$\$				•									CITY					
	URP-021 (Academy Boulevard Reconstruction North)	\$\$				•									CITY					
	URP-023 (Pikes Peak and Institute)	\$\$				•											RFP			
	Pine Valley WTP SAA	***	•	•	•	•	•	•	•	•	•	•	•			RFP				
	Tollefson - Bear Creek Intake and Pump Station Assessment	**	•	•	•	•	•	•	•	•	•	•	•		RFP					
	N. Slope - South Catamount Dam Rehabilitation Assessment	\$	•	•	•	•	•	•		•		•	•			RFP				
	Homestake System Intakes and Diversions Assessment	*	•		•	•	•										IFB			
Northfield Transmission Main and Pump Station Study	**	•		•	•										RFP					

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WW	LVSRRF Replace Gates at Primary Clarifiers	\$\$	•		•	•	•	•	•					IFB					
	Northern Monument Creek Interceptor Final Design	\$\$	•											RFP					
	CSRRRF- Electrical Upgrades Project	\$\$										•		RFP					
	JDPWRRF- Replace Gates to Secondary Clarifiers	\$\$					•	•		•				RFP					
	LVSRRF Aeration System Modifications	\$\$								•						RFP			
	LVSRRF East Non-Potable Water Reservoir Liner Replacement	\$						•						IFB					
	URP-010 (Downtown)	\$				•									RFP				
	URP-021 (Academy Boulevard Reconstruction North)	\$\$				•								CITY					
	JDPWRRF Facility Plan					•	•	•	•	•	•	•	•						

Facilities	Security Camera System Upgrade	**	•									•		IFB			IFB		
	ESSC Roof Top Unit Upgrade and Replacement	\$									•	•					IFB		
	BRDS02 Cooling Tower Upgrade and Replacement	\$									•	•					IFB		
	Bailey WTP Roof Repairs/Replacement	\$	•			•									IFB				

Procurement Execution

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Proposed projects subject to appropriation of budget

# Q & A





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# Larry Dunn

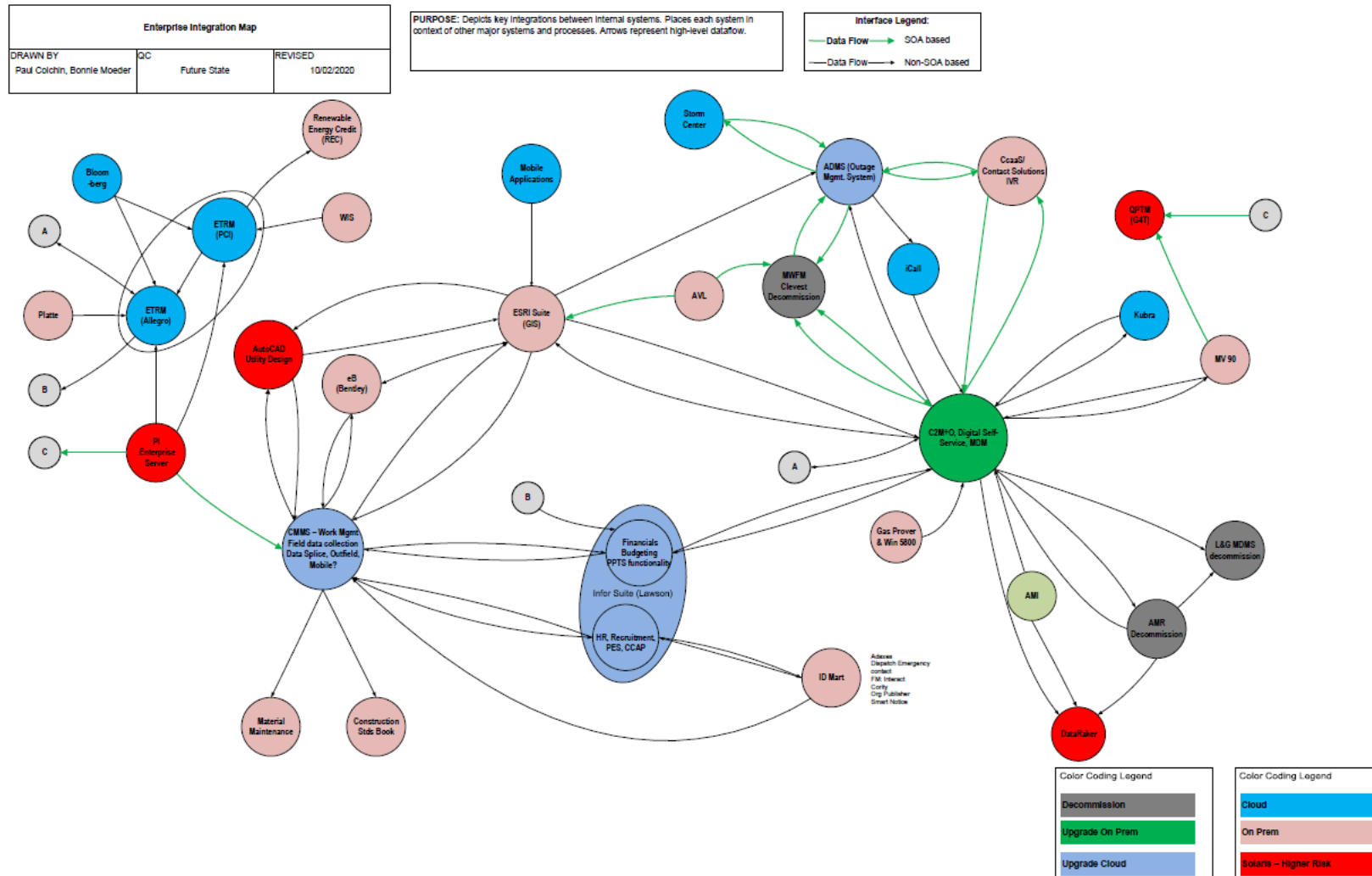
Information Technology General Manager

Technology Portfolio Review

# Utilities Technology – Immediate Goals

- Improve system resiliency and reliability
- System upgrades and consolidation
- On premise and cloud for both systems and data
- *Eliminate Complexity – Standardize and Operationalize*

# Utilities Technology - Today



# Utilities Technology - Tomorrow

- Embrace improved analytics, AI, machine learning; first share the data
- Dramatic increase in sensors and linear asset inputs – improve service efficiency and effectiveness
- Apply industry best practices and tools
- Leveraging the fiber network
- Enhanced customer experience
- *Embrace the Future*



# Information Technology Transformation

- Organized along workflow
- Managed services where appropriate
- Coordinating applications across the organization
- Primary supplier contact – Charlotte Woodard

# Major Programs

Significant Technology Programs & Projects	2022	2023	2024	2025	2026
<b>Customer</b>					
Customer Technology Modernization / Self Serve	In Progress	In Progress			
Rate Modeling				RFP To Issue	RFP To Issue
Customer Relationship Mgmt					RFP To Issue
<b>Enterprise Resource Planning</b>					
Financial & HR System Upgrade	In Progress	In Progress			
Supply Chain		In Progress	In Progress		
<b>Asset Management</b>					
Work Management (CMMS)		RFP To Issue	RFP To Issue	RFP To Issue	
Geometric Network to Utility Network		RFP To Issue	RFP To Issue		
<b>Linear Network / IoT</b>					
Fiber Tenants	Partially in Progress - Seeking Additional Suppliers	Partially in Progress - Seeking Additional Suppliers	Partially in Progress - Seeking Additional Suppliers	Partially in Progress - Seeking Additional Suppliers	Partially in Progress - Seeking Additional Suppliers
Last Mile Wireless Connectivity	RFP To Issue	RFP To Issue			
Linear Sensors (each system)		RFP To Issue	RFP To Issue		
Edge Computing		RFP To Issue	RFP To Issue		
Distributed Energy Management System		RFP To Issue	RFP To Issue	RFP To Issue	
<b>Other Strategic Efforts</b>					
Cyber Strategy & Get Better Program	Partially in Progress - Seeking Additional Suppliers	Partially in Progress - Seeking Additional Suppliers			
Cloud Master Agreements	Partially in Progress - Seeking Additional Suppliers				
Managed Services	Partially in Progress - Seeking Additional Suppliers	Partially in Progress - Seeking Additional Suppliers	Partially in Progress - Seeking Additional Suppliers	Partially in Progress - Seeking Additional Suppliers	Partially in Progress - Seeking Additional Suppliers
Data Strategy / Analytics / AI / Predictives	RFP To Issue	RFP To Issue	RFP To Issue	RFP To Issue	RFP To Issue
Advanced Tech Center - Data & Control Center			RFP To Issue	RFP To Issue	RFP To Issue

In Progress
Partially in Progress - Seeking Additional Suppliers
RFP To Issue

# Major Programs & Projects

- Expanded cloud deployment and information integration
- Work management upgrade
- Fiber deployment leads to greatly expanded sensor data – how do we manage and utilize this data
  - IoT (Internet of Things) including IIoT
  - Improved visibility of our linear network
  - Edge computing
  - The AI and ML to support
- Improve our mobile tools for our workforce

# Major Programs & Projects - Continued

- Improve our customer experience
- Managed services where appropriate
- Better monitoring and system self healing
- Distributed energy

# Q & A





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**Somer A. Mese**

General Manager of Operations - ESD  
Operational Program Review

# Operations Division

The Operations Division was created in 2021 to consolidate the operations and maintenance of all four services (gas, electric, water, and wastewater), resulting in a continuity of processes on job sites while producing excellent services to our community.

Division consists of:

- Asset Management & Geospatial Technology (ASM)
- Network Transportation Services Portfolio (NTS)
- Energy Supply Department (ESD)
- Energy Construction, Operations, & Maintenance (ECOM)
- Water & Wastewater Operations (WWO)

# Asset Management & Geospatial Technology



- The mission & goal of ASM is to effectively design and implement technology solutions and business processes that support:
  - Planning and the delivery of infrastructure projects
  - Provide advanced solutions through integrated asset management for our customers and stakeholders.



# Asset Management & Geospatial Technology

- ASM Projects
  - Asset Business Intelligence
    - Validation/update of all necessary asset data manage, analyze, and engage digitally with assets through their operational and engineering lifecycle.
  - Asset Digital Twin Development/Implementation
    - Subset of the Asset Business Intelligence - iAM initiative
    - Vertical, Linear
    - 3D asset visualization/engagement
  - Enterprise Field Mobility Implementation
    - Geospatial (Esri), Clevest
    - Workforce Visibility
  - AR readiness
    - Acquisition/update of all utilities with sub-foot accuracy

# Network Transportation Services

- NTS is responsible for connecting every source and demand for utilities in our service territory with secure and reliable high-bandwidth communication to enable real time decisions for a more sustainable future
- Responsible for expanding & improving the fiber optic telecommunications infrastructure of our community.



# Network Transport Services Projects

- Current Projects
  - City Wide Fiber Build (multi year project)
  - Communications Support for various substation builds and expansions
  - TNGG communications support
  - Fiber Infrastructure support for ongoing City Road projects - relocating, adding new infrastructure
  - Communications support for Operations and Physical Security expansions/upgrades
  - Support/renewals for multiple non-core communications efforts
- 2023 Projects
  - Motorola radio lifecycle replacement (multi year project)
  - 2023 – Network Transport lifecycle replacements (SCADA radio and media converter)
  - Aviat Microwave lifecycle upgrade
  - Drake communications infrastructure decommissioning
  - Communications installation on new Transmission lines
  - City Wide Fiber Build ongoing (multi year project)

# Energy Supply Department

- ESD is comprised of Colorado Springs Utilities electric generating facilities including:
  - Drake Power Plant
  - Birdsall Power Plant
  - Front Range Power Plant
  - Nixon Power Plant,
  - Four Hydro Electric Generating Facilities
  - Propane Air Plant
- Energy Supply is responsible for establishing reliable, low-cost electric and natural gas supplies to industrial, commercial and residential customers across the region.



# Energy Supply Department Projects

- Current Projects
  - Drake transition & construction of TNGG's
  - Maintenance outages at Birdsall Plants
    - Turbine/generator
    - Critical pumps
  - Turbine repairs at Nixon CT3
  - New solar in negotiation
  - Joining of Southwest Power Pool energy market
- 2023 Projects
  - Drake decommissioning
  - Front Range hot gas path replacement (multi year project)
  - Front Range CT2 rotor replacement (multi year project)
  - Front Range air cooled condenser electrical upgrade

# Energy Construction, Operations, & Maintenance



- ECOM is comprised of six sections:
  - Electric Construction and Operations
  - Electric Operations and Engineering
  - Gas Construction Operations and Maintenance
  - ECOM Support Services
  - Field Services
  - Advanced Utilities Technology
- ECOM's key areas of responsibility include:
  - Constructing, operating & maintaining safe, reliable, & cost-effective Gas and Electric system for our customers
  - Providing 24/7, 365 days per year emergency response and Dispatch
  - Installing, repairing, and maintaining metering equipment
  - Providing support services that facilitate the function of operations & construction by supporting all utility services to include Locating, Restoration, Facilities Maintenance, Directional Drilling, Weld Shop, Apparatus Shop and Barricades.

# Energy Construction & Maintenance Projects

- Current Projects
  - Advanced Metering Infrastructure (AMI) deployment
  - Advanced Distribution Management System (ADMS) deployment
  - Mobile Workforce Management (MWM) upgrade
  - Steady state transmission & distribution integrity maintenance (pole program, apparatus replacement, substation equipment replacement, etc.)
  - Ongoing streetlight program (\*transition to LED)
  - TNGG installation support
  - Gas distribution system integrity improvements (mains, service lines, valves, etc.)
- 2023 Projects
  - Continue AMI deployment (multi-year project)
  - Fiber deployment project support (multi-year project)
  - Continued gas distribution system integrity improvements
  - New substation construction support
  - System metering upgrade

# Water & Wastewater Operations

- WWO is comprised of:
  - Technical Services
  - Construction and Maintenance
  - Water Treatment Plants (Mesa, McCullough, Baily, Fountain Valley)
  - Wastewater Operations (J.D. Phillips, Las Vegas & Clear Springs solids handling)
- WWO is responsible for the operation and maintenance of:
  - Raw water storage, collection & transmission
  - Water treatment facilities
  - Water distribution system
  - Wastewater collection system & treatment
- WWO ensures safe, reliable, and financially responsible water & wastewater services to our customers.





# Water & Wastewater Operations Projects

- Current Projects
  - Crystal Creek Reservoir dam restoration
  - 33<sup>rd</sup> street raw water pipeline & pumpstation upgrade
  - Multiple pipeline projects, including upgrades & infrastructure maintenance for potable & wastewater
  - Potable water pump station replacements
  - Potable water tank refurbishments
  - Water valve replacement program
  - Clear Springs Ranch facility biogas project
  - Clear Springs Ranch electrical upgrades
  - Las Vegas treatment facility blower aeration modification (multi year)
  - JD Phillips facility diversion structure
- 2023 Projects
  - Northern Monument creek interceptor (multi year project)

# General Operations Materials

- Materials Needed as Part of Normal Operations
  - Chemicals (hydrogen, bleach, acid, lime, etc.)
  - Pipe
  - Valves
  - Pumps
  - Wire
  - Transformers
  - Light fixtures & bulbs
  - Controls Components (PLC's, actuators, indication for level, flow, temperature, etc.)

# Q & A





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# **Rich Norton**

## Interim General Manager

### Procurement Overview

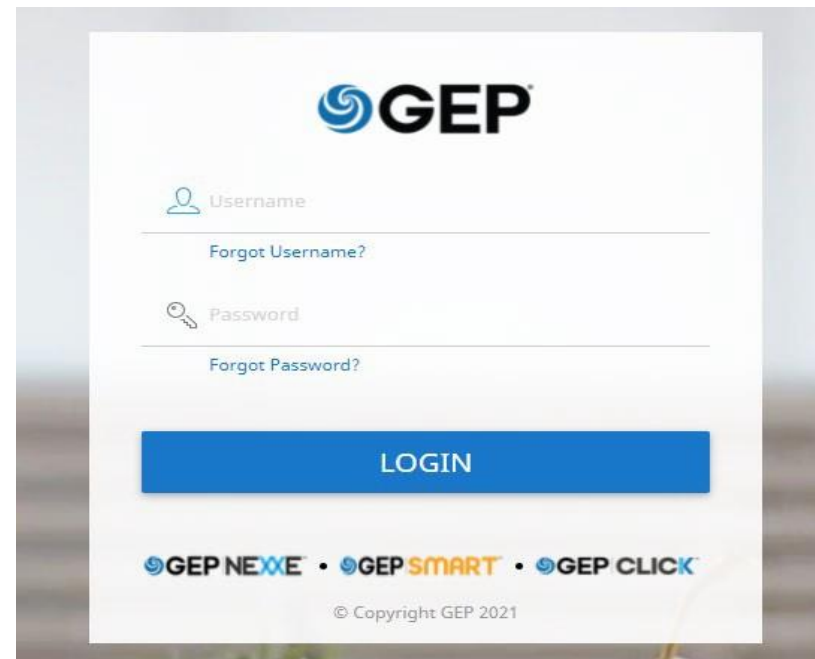
# GEP SMART Tool – Big Change

The move to GEP SMART allows Utilities to replace a number of legacy systems while streamlining the sourcing and contracting process. The benefits of the new system include:

- Better defined workflows
- One central repository for contractual and sourcing documents
- Improved ability to track the status of sourcing events and execution of contracts
- Reduced overall time to conduct sourcing events and negotiate and execute contracts
- Enhanced communication abilities
- Greater transparency of sourcing and contracting event details

# GEP SMART Tool – How to Sign In

- Link for GEP Production: [smart.gep.com](https://smart.gep.com) (Must use Chrome or Edge browser)
  - Do NOT use Internet Explorer and Firefox browsers
- You will be required to enter your username and password



The image shows a screenshot of the GEP SMART login interface. At the top center is the GEP logo, which consists of a blue circular icon with a white swirl and the letters 'GEP' in a bold, black, sans-serif font. Below the logo are two input fields. The first field is labeled 'Username' with a small person icon to its left. Below the input field is a link that says 'Forgot Username?'. The second field is labeled 'Password' with a small key icon to its left. Below the input field is a link that says 'Forgot Password?'. At the bottom of the form is a large blue button with the word 'LOGIN' in white, uppercase letters. Below the button are three logos: 'GEP NEXXE' with a blue swirl icon, 'GEP SMART' with a blue swirl icon and the word 'SMART' in orange, and 'GEP CLICK' with a blue swirl icon. At the very bottom, there is a small copyright notice: '© Copyright GEP 2021'.

# GEP SMART Tool – How to Register

If you do NOT have a username and password, you must proceed to do the following:

Your company must be registered in GEP SMART to view or participate in Utilities sourcing events. There is no cost to register, and it only takes a few minutes.

To begin the process, please email Colorado Springs Utilities at [SupplierOnboarding@csu.org](mailto:SupplierOnboarding@csu.org) with your

- **Company Name**
- **Primary Contact Name**
- **Email**
- **Phone Number**
- **Copy of Firms W9**

Once this information is received, the firm will be registered as a supplier in the system and sent an email with the link for completion of registration. If you have any questions about the process, please send an email to [procurement@csu.org](mailto:procurement@csu.org).

# GEP SMART Tool – Category Selection

## Example Purposes Only

Add Category

Search

① Click on the (+) sign to open the tree and select

- CONSTRUCTION & ENGINEERING
- DIRECT MATERIALS & SERVICES
  - CHEMICALS AND GASES
    - CHEMICALS
      - ALUMINUM SULFATE
      - CHLORINE
      - FERRIC SULFATE
      - FERROUS CHLORIDE
      - LIQUID OXYGEN

When you set up your Supplier profile it is important that you select the correct categories that you can support. These categories are used to invite our Suppliers to sourcing events.

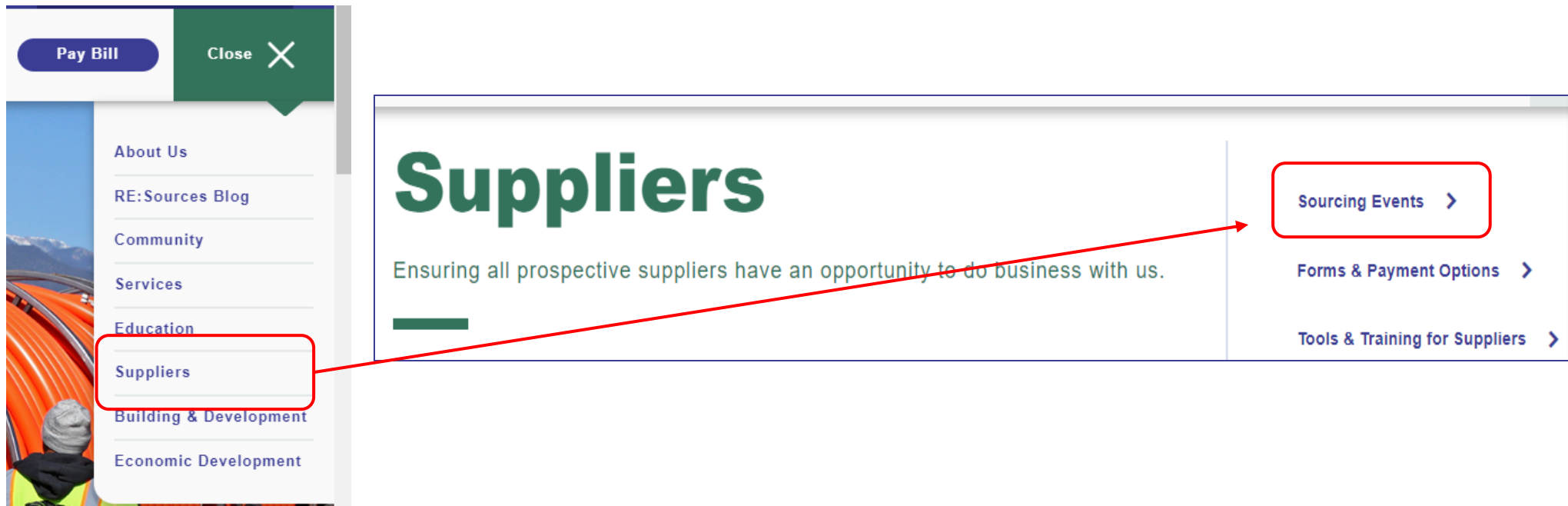


# GEP SMART Tool

At lunch time and this afternoon there is a breakout session that is dedicated to respond to your questions and receive your feedback regarding GEP SMART.

# Sourcing Event List

If you are interested in seeing a list of the sourcing events that have not been published yet, are in progress, or have completed; please go to the Utilities supplier website (csu.org).



# Sourcing Event List

## Sourcing Events

Search our database for past, current and upcoming sourcing and contract events.

Event Name	Event Author	Start Date	End Date
000303-APR2022 GRANT MANAGEMENT SERVICES	Tanmay Desai	5/6/2022	5/27/2022
COMMUNICATION SITE AND TOWER CONSTRUCTION	Tanmay Desai	5/6/2022	5/14/2022
MAKE-READY POLE DESIGN	Kelly Valdez	5/6/2022	5/19/2022
PIPE - LOCH FYNE, MANITOU PHASE IV & V	Chris Drake	5/6/2022	5/20/2022
MARTIN DRAKE POWER PLANT ABATEMENT AND DEMOLITION RFP	Iza Podlecki	5/4/2022	6/2/2022
SUBSTATION DISCONNECT SWITCH ALLIANCE BLANKET	Marisa Donegon	5/3/2022	5/11/2022
LM2500 RELOCATION DESIGN CONSULTANT	Melanie Betsayda	4/29/2022	5/27/2022
LVSRRF BLENDED SLUDGE PUMP STATION PUMP REPLACEMENT SAA	Tanmay Desai	4/29/2022	5/20/2022
UTILITY CONSTRUCTION AND MAINTENANCE SERVICES FOR ELECTRIC SYSTEMS	Iza Podlecki	4/28/2022	5/26/2022
INVITATION FOR BID - CONTRAILS FWLAP	Loreen Slick	4/25/2022	5/16/2022

[Click on Event Name Above to See Selected Event Description \(if Applicable\)](#)

The report page will appear as you see it on the left. The report is unsorted. You can sort Past, In Progress, Future Events, Event Name, Event Description, or by column headers.

Event Name	Event Author	Start Date	End Date
LM2500 RELOCATION DESIGN CONSULTANT	Melanie Betsayda	4/29/2022	5/27/2022
LVSRRF BLENDED SLUDGE PUMP STATION PUMP REPLACEMENT SAA	Tanmay Desai	4/29/2022	5/20/2022
UTILITY CONSTRUCTION AND MAINTENANCE SERVICES FOR ELECTRIC SYSTEMS	Iza Podlecki	4/28/2022	5/26/2022
INVITATION FOR BID - CONTRAILS FWLAP	Loreen Slick	4/25/2022	5/16/2022
CLEAR SPRING RANCH RESOURCE RECOVERY FACILITY'S GRIT LANDFILL PLANNING AND DESIGN SERVICES	Tanmay Desai	4/21/2022	5/12/2022
NORTH SLOPE RECREATION AREA (NSRA) COMMERCIAL RECREATIONAL USE PILOT PROGRAM	Marisa Donegon	4/20/2022	5/18/2022
HOMESTAKE COLLECTION SYSTEM PIPELINE REPAIR AND REHABILITATION- CONSTRUCTION	Loreen Slick	4/19/2022	5/31/2022
BROADMOOR TANK 4 REHAB	Melanie Betsayda	4/18/2022	5/9/2022
IFB - FONTENERO ASPHALT REPAIRS	Scott Moritz	4/18/2022	5/9/2022
000295-APR2022	Tanmay Desai	4/13/2022	5/5/2022
COMMERCIAL BUILDING EFFICIENCY PROGRAM			

[Click on Event Name Above to See Selected Event Description \(if Applicable\)](#)

The objective of this project is to replace approximately 10500' lineal feet (LF) of 6", 8", 12" Cast Iron (CIP) water main pipe with 8" diameter polyvinyl chloride (PVC) to include all appurtenances and associated infrastructure to ensure a complete and efficient installation as detailed in the attached drawings entitled, Contrails Drive Water Main Replacement Project. This water main replacement project is pre-work to the 2C Ballot Initiative.

When you find a sourcing event you would like to review, click on it and the full description will appear below. You will see the Event Author (owner), start Date and End Date of the event.

# Alignment – Why is it important?



Improve Collaboration between  
Supplier & Utilities



Mutual Understanding  
of Roles &  
Responsibilities



Mutual Understanding of  
Utilities Policies &  
Processes



Improve Overall  
Project Planning &  
Execution



Develop Solutions to  
Challenging or Complex  
Projects and/or Issues

FINANCIAL



Ensure we are delivering a product  
or service that achieves a high level  
of performance and at the most  
competitive cost

# Key Policy Statements to Know

All requests for the purchase of goods and/or services may go through one or more of the following internal review processes.

- Legal Review
- Risk Management (Certificate of Insurance)
- Information Technology / Cyber Security / PIP
- Safety and Health
- National Electric Regulatory Commission (NERC)
- Gas, Colorado Department of Transportation (CDOT)

# Key Policy Statements to Know

**What are the Minimum Competition Requirements that apply to the Procurement of Goods/Services?**

Spend Level	Level of Operational & Financial Risk	Level of Cost Savings Opportunity	Type of Procurement Event
>\$250K			Formal
>\$100K and < \$250K	High	High	Formal
>\$100K and < \$250K	Low	High	Informal
>\$100K and < \$250K	High	Low	Informal
>\$100K and < \$250K	Low	Low	Informal

# Key Policy Statements to Know

## What is a Small Purchase?

**Small Purchases** - Shall be used for the purchase of Goods and/or Services where the total spend for a unique / one-time purchase (project) is less than \$100,000 or the annual spend for a category is less than \$100,000 - Internal Stakeholder will be responsible to work with the Procurement Team in obtaining a minimum of three (3) quotes.

# Key Policy Statements to Know

**Will every purchase require a purchase order prior to the rendering of the service or the purchase of the good?**

*YES*

- All procurable goods and/or services will require that a purchase order, including releases, shall be issued prior to the purchase of the good or the rendering of the service. Purchase orders shall not be created after goods or services are received, based on the receipt of an invoice.



# Key Policy Statements to Know

## **Do We Withhold Retainage?**

Retainage of five percent (5%) of the Contract value shall be withheld for all Public Works Contracts, and Task Orders, for verifiable work accomplished by the Contractor. Retainage is withheld when the Contract is \$100,000 or greater in cost. If the duration of the Contract is two months or less in duration and there are no subcontractors, Procurement has the authority to waive retainage.

# Key Policy Statements to Know

## **Do We Require the Use of Bonds?**

- Performance and Payment Bonds will be required for all Public Works Contracts expected to exceed \$100,000 in the amount of 100% of the Contract price.
- Bonding for Utilities multi-year Blanket Contracts that exceed \$100,000 where releases may exceed \$50,000 will be bonded in an amount determined by Procurement. Bonding shall be established at two times the maximum expected task order release amount; however, Procurement shall use its discretion in determining the bond amount.

# Key Policy Statements to Know

## **Does Colorado Springs Utilities Leverage Small / Disadvantaged / Local / Women Owned / Veteran Businesses?**

- Utilities supports the growth and development of small, disadvantaged, local, minority, veteran and women owned businesses and actively encourage their participation in our Procurement process.

# Procure to Pay Process (P2P)

Procure-to-pay (P2P) is a business process cycle spanning from procurement functions for goods and services needed, to receiving procedures, including verification, to accounts payable and accounting functions. Payables duties include vendor invoice matching to purchase orders and receiving reports, getting invoice approvals, paying approved invoices, recording transactions, and generating reports. We will be implementing a New P2P application in 2023. Stay tune for more updates in the future.

## Procure to Pay Process

### Requisition



Employees request what they are looking for.

### Approvals



Authorization of the spend as your corporate policy.

### Purchase Order



Purchase order generated and sent to the supplier.

### Receipt



The order is shipped by the supplier and received by your organization.

### Invoice



Invoice received and reconciled, 2-way or 3-way match. Invoice is ready to be paid.

### Payment



Payment issued to the supplier.

# Q & A





Colorado Springs Utilities  
*It's how we're all connected*

# **Tatianna Manco**

**TManco@csu.org**

**Business Application Administrator**

**GEP Smart – Profile Management**

# Agenda

GEP SMART Tool – What is it?

How to sign in?

GEP Platform

Supplier Module

Supplier Profile

Personal Profile

Q & A



Colorado Springs Utilities  
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# GEP SMART

What is it?



# GEP SMART Tool

The move to GEP SMART allows Utilities to replace several legacy systems while streamlining the sourcing and contracting process. The benefits of the new system will include:

- Better defined workflows
- One central repository for contractual and sourcing documents
- Improved ability to track the status of sourcing and contract execution
- Reduced overall time to conduct sourcing events and negotiate and execute contracts
- Enhanced communication abilities
- Greater transparency of sourcing and contracting event details



Colorado Springs Utilities  
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# GEP SMART

How to sign in?

# Not Registered with CS Utilities Yet?

If you do NOT have a username and password, you must proceed to do the following:

- Email Colorado Springs Utilities at [SupplierOnboarding@csu.org](mailto:SupplierOnboarding@csu.org) with
- Company Name
- Primary Contact Name
- Email
- Phone Number
- Copy of Firms W9

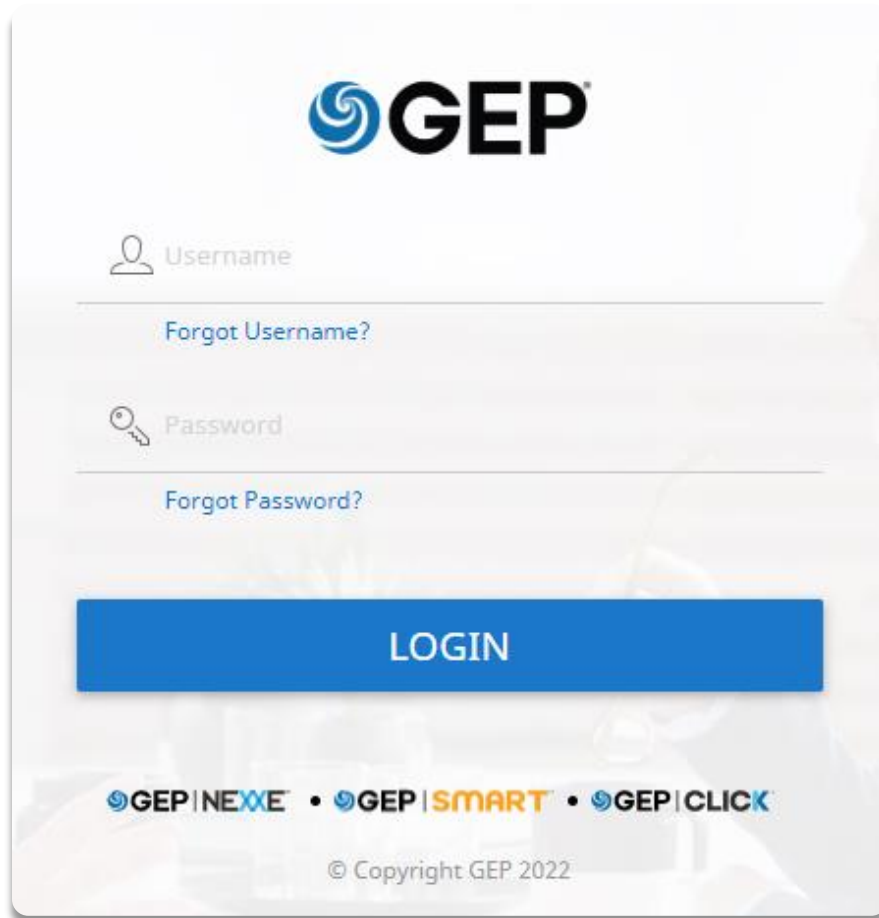
Once this information is received, the firm will be registered as a supplier in the system and sent an email with the link for completion of registration. If you have any questions about the process, please send an email to [procurement@csu.org](mailto:procurement@csu.org).

# Not Registered with CS Utilities Yet?

If you do NOT have a username and password, you must proceed to do the following:

- Email Colorado Springs Utilities at [SupplierOnboarding@csu.org](mailto:SupplierOnboarding@csu.org) requesting to be registered with CS Utilities.
- CS Utilities will email the supplier a link that will allow the supplier to Self Register.
- Once this information is received, CS Utilities Supplier Manager will review the supplier information to check for duplicate supplier records and either approve or reject the registration request.
  - Duplicate records will be rejected and the primary contact for the supplier account will be provided to the requestor.
- If you have any questions about the process, please send an email to [procurement@csu.org](mailto:procurement@csu.org).

# How to sign in?



The image shows a login page for GEP. At the top is the GEP logo. Below it are two input fields: 'Username' with a person icon and 'Password' with a key icon. Each field has a 'Forgot' link below it. A large blue 'LOGIN' button is centered below the fields. At the bottom, there are logos for GEP NEXXE, GEP SMART, and GEP CLICK, followed by the copyright notice '© Copyright GEP 2022'.



- GEP SMART Link: **smart.gep.com**
- Use Chrome or Edge browser
  - Do NOT use  
Internet Explorer or Firefox
- Enter username and password

# Multiple Company Profiles



## Select Supplier

Please select the Supplier organization that you represent:

<input checked="" type="radio"/>	 Colorado Springs Utilities <i>It's how we're all connected</i>	Tati's Business DONT USE	PC-2021.001072	<input type="radio"/>	 Colorado Springs Utilities <i>It's how we're all connected</i>	Rich Test 1	PC-2021.001102
<input type="radio"/>	 Colorado Springs Utilities <i>It's how we're all connected</i>	Rich Test 2	PC-2021.001103				



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# **GEP SMART**

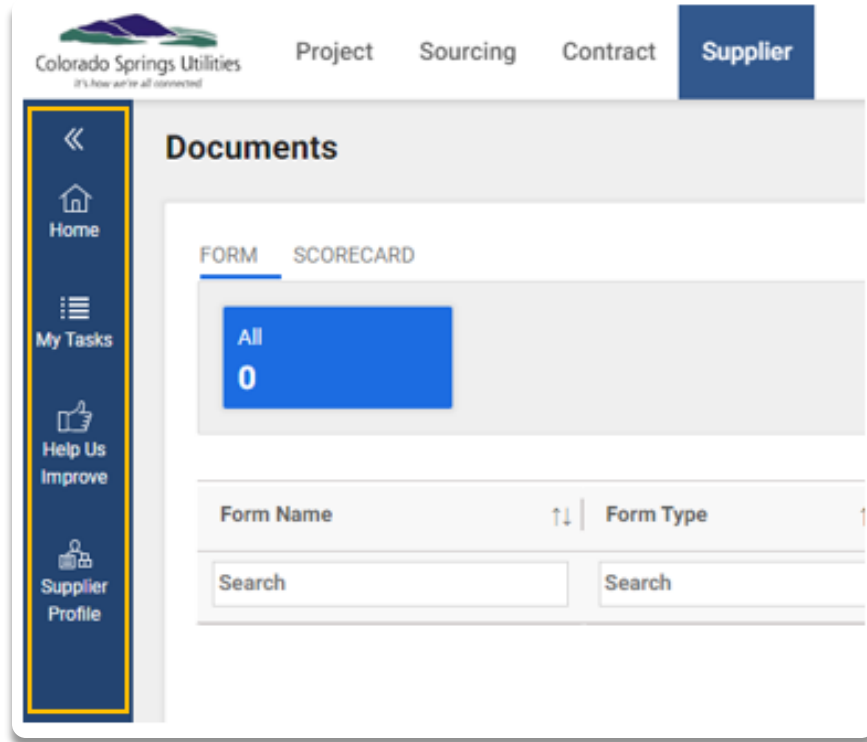
GEP Platform

# Platform

The screenshot displays the Colorado Springs Utilities platform interface. At the top left is the logo for Colorado Springs Utilities with the tagline "It's how we're all connected". To the right of the logo are navigation tabs for "Project", "Sourcing", "Contract", and "Supplier". A search bar is located to the right of these tabs. Further right are icons for a bookmark, a megaphone, a question mark, and a "TM" logo. A dark blue sidebar on the left contains navigation options: "Home", "My Tasks", "Help Us Improve", and "Supplier Profile". The main content area shows a document management section with tabs for "DRAFT (0)", "ACTION PENDING (0)", and "FOLLOW UP (0)". The "DRAFT (0)" tab is selected. Below the tabs is a large grey rectangular area containing the text "No documents found". At the bottom of the main content area, there is a pagination control showing "Rows Per Page: 10" with a dropdown arrow, followed by "0 - 0 Of 0" and navigation arrows.



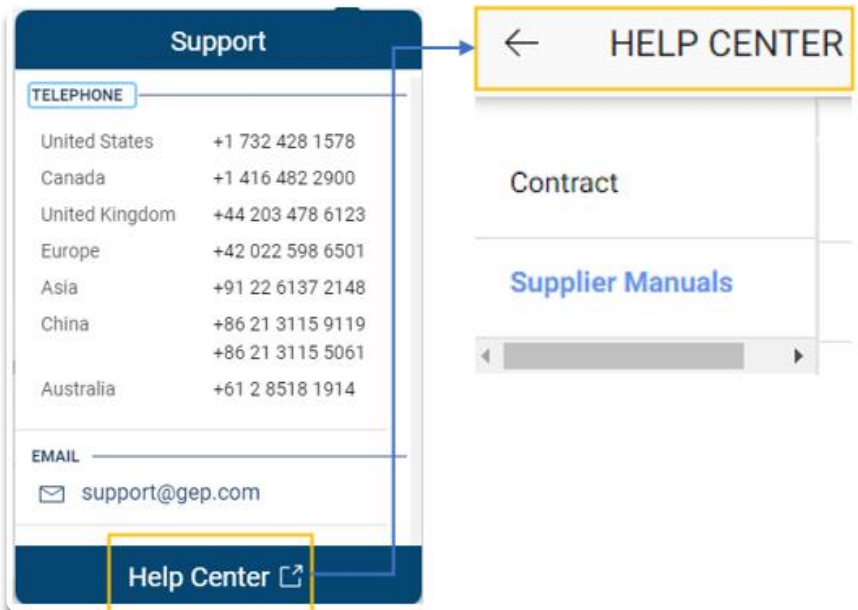
# Task Bar



## Task Bar Features:

- **Home:** Default home page (i.e., Contract)
- **My Tasks:** Lists Action Pending and Follow Up for specific actions or tasks that the Supplier must complete.
- **Help Us Improve:** Optional Survey for GEP
- **Supplier Profile:** Section to complete Supplier information

# Help Center



## Help Center Features:

- **Module Sections:** Under each section the supplier will find documents related to the module
- **Supplier Manuals:** Process documents related to each Module

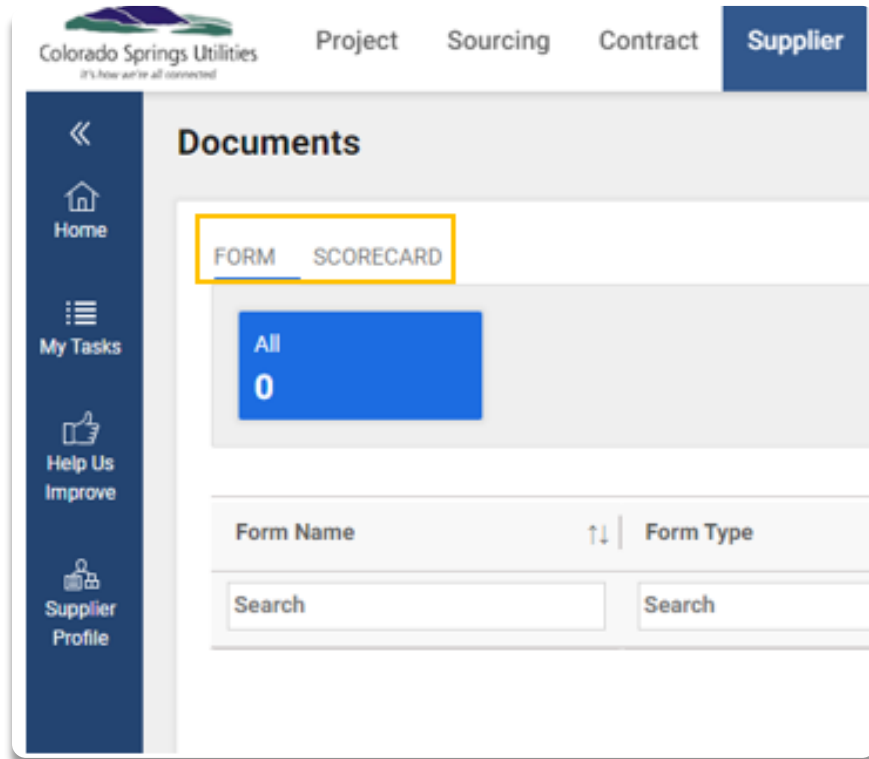


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# **GEP SMART**

## Supplier Module

# Form & Scorecard



Under the tab Supplier, there are two sections:

- **Form:** provided by CSU (none available at this time)
- **Scorecard:** This section will be used to assess the Supplier's overall performance as it relates to
  - Quality
  - Delivery
  - Cost Management
  - Technical & Commercial Support
  - Overall Relationship

(CS Utilities will be utilizing this feature later).

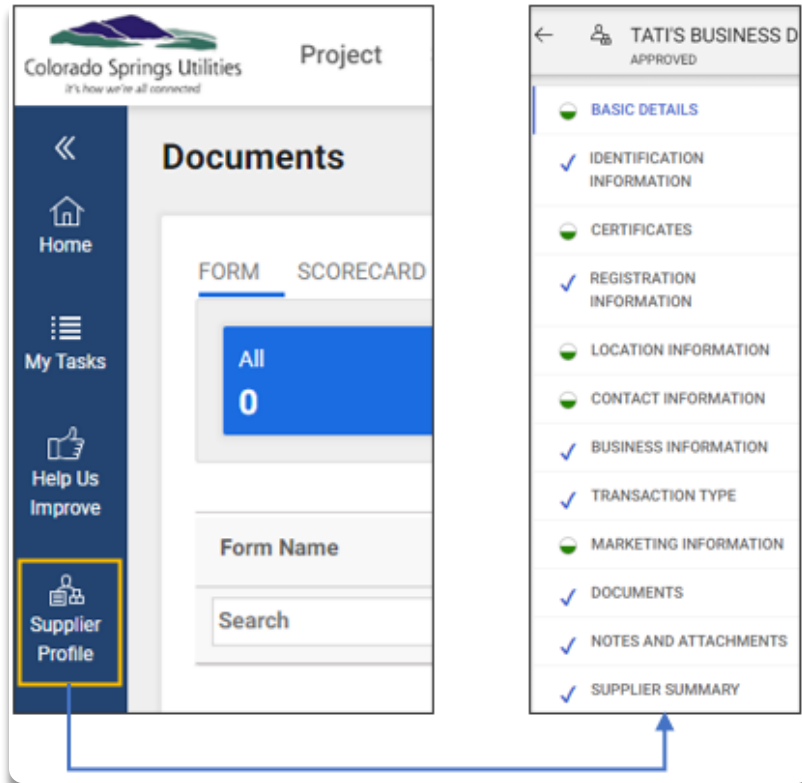


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# GEP SMART

## Supplier Profile

# Supplier Profile



Supplier must keep their profile current

- **Checkmarks:** Indicate the section is complete
- **Half Circles:** Indicate the section is incomplete

*Note: not all information is required, some circles may never show fully completed.*

For any questions regarding the process, send an email to [procurement@csu.org](mailto:procurement@csu.org).

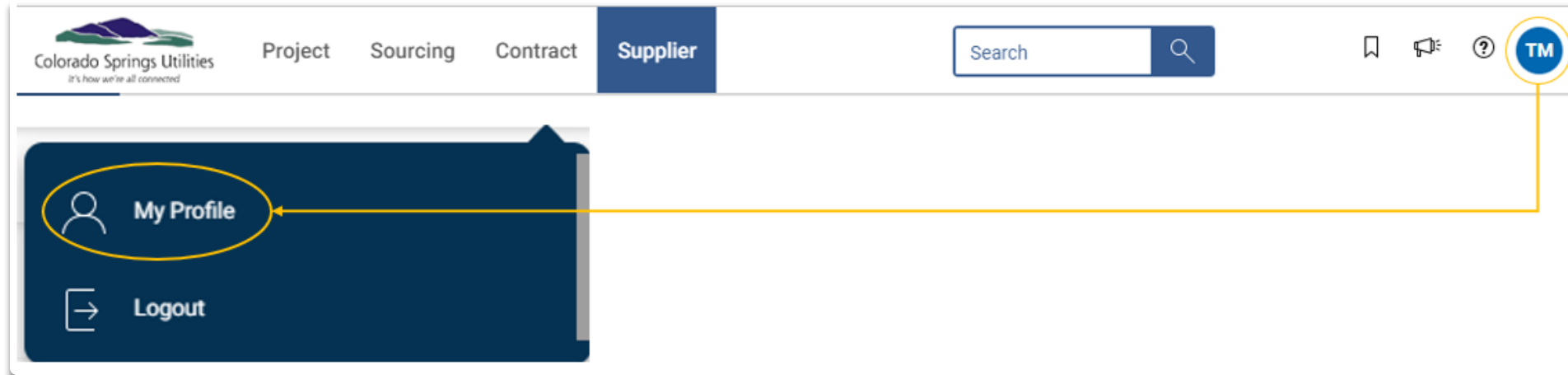


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# **GEP SMART**

## Personal Profile

# My Profile



## My Profile Settings

- Click on the initials to access setting



# My Profile

**Account Settings**

Set Preference f

First name\*  
Tatianna

Last name\*  
Manco

User Email\*  
tmanco@csu.org

Username  
Tmanco

Extension 1  
0

Extension 2  
0

Phone 1  
17196687360

Phone 2

Persona  
Supplier Contact

View Activities

Country Code  
United States

Mobile Number ⓘ  
5037240000

Change Password

**Regional Settings**

Time Zone  
(UTC-06:00) Mountain Time (US & ...

Language  
English

Country  
United States

**Electronic Signature Settings**

## Accounts Settings

- **Account Settings:** Update settings
  - Personal Information
  - Change password
- **Regional Settings:**
  - Set Time Zone (correct time zone is critical for sourcing events)
  - Language
  - Country
- **Electronic Signature Settings:** are not needed.
  - CS Utilities utilizes AdobeSign to sign contracts

# Q & A





Colorado Springs Utilities  
*It's how we're all connected*

# **Tatianna Manco**

[TManco@csu.org](mailto:TManco@csu.org)

Business Application Administrator

GEP Smart – Contracts and Sourcing Events

# Agenda

GEP SMART Tool – What is it?

View, Negotiate & Manage a contract

Responding to a Sourcing Event

Q & A



Colorado Springs Utilities  
*It's how we're all connected*

# GEP SMART

What is it?

# GEP SMART Tool

The move to GEP SMART allows Utilities to replace several legacy systems while streamlining the sourcing and contracting process. The benefits of the new system will include:

- Better defined workflows
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- Improved ability to track the status of sourcing and contract execution
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- Greater transparency of sourcing and contracting event details



Colorado Springs Utilities  
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# **GEP SMART**

View, Negotiate & Manage a Contract

# View Contracts

CONTRACT

Filter Tabs

All 11 | Expired 3 | Live 2 | Signature Process Initiated 2 | Signed 2 | Approved 1 | Team Reviewed 1

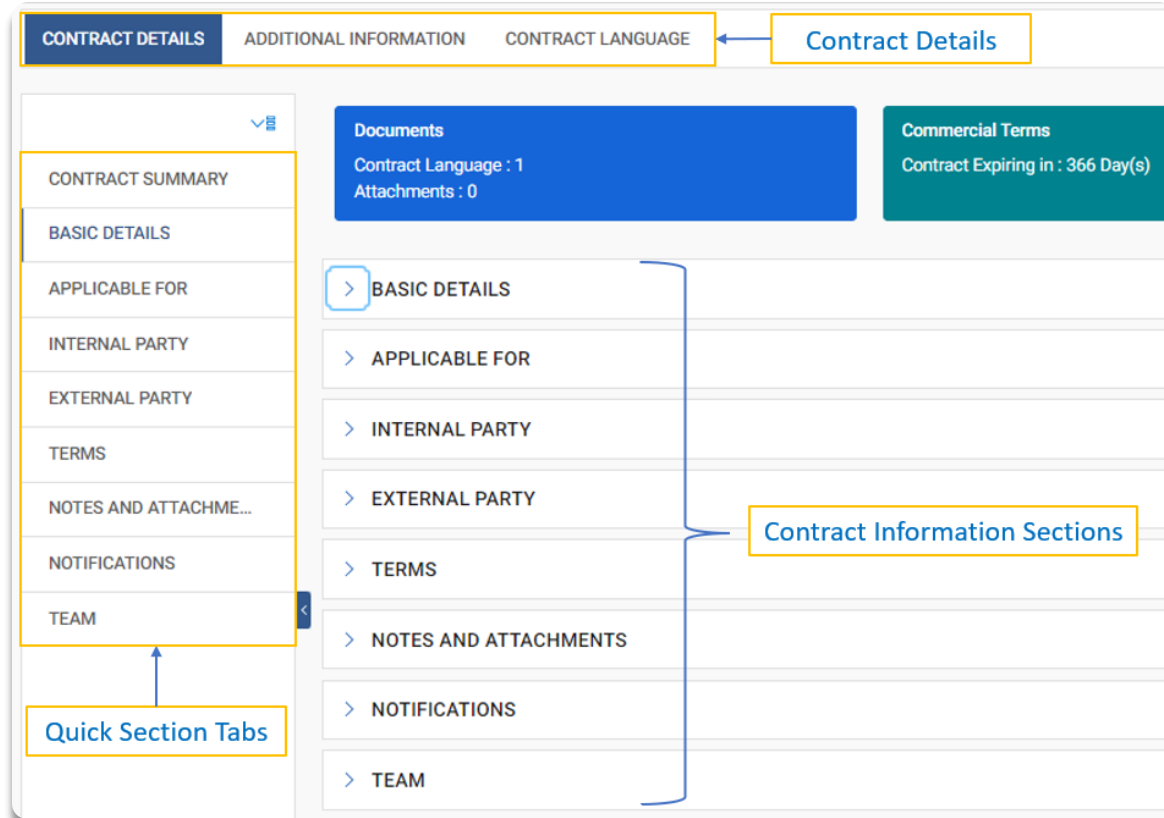
Contract Name	Contract Number	Contract Administrator	Contract Sponsor	Status
Calibration of North District Test Instruments	202008064	Tatianna Manco	Tatianna Manco	Live
Test Adobe Sign	2022.000341	Tatianna Manco		Signed
Copy of Adobe Sign Testing	2022.000319	Tatianna Manco	Kayla Kestel	Expired

Contracts are visible in the Contract Module home page.

- **Filter Tabs:** View contracts in different statuses.
- **Columns:** Find the Contract Administrator, Contract Sponsor, Contract Status, etc.



# Contract Details



The Contract Information page holds all pertinent details regarding the contract.

# Basic Details

▼ BASIC DETAILS

Contract Name*	Contract Number*	Document Type*	Contract Type*	Contract Administrator
Calibration of North District Test Instr...	202008064(Revision 1)	Goods & Services Contract	Master Agreement	Tatianna Manco
Description Contractor to Calibrate Drake I and C equipment				
Amendment Type* Terms and Conditions				

## Basic Details

- **Contract Name** – Name given by the Utilities.
- **Contract Number** – A unique number aligned to the contract auto assigned by GEP. The contract # will have the word (Revision #) after the it when an amendment has been completed on a contract.
- **Document Type** – Type of template used to create the contract.
- **Contract Type** – Master Agreement Contract, Non-Disclosure Agreement for NDA's, Sub Agreement for Task Orders, Amendments or Change Orders.
- **Contract Administrator** - The Utilities Administrator of the contract.
- **Description** - Short description of what the contract relates to.
- **Amendment Type** – Visible when Amendments have been made to the contract.

# Applicable For

APPLICABLE FOR		
Category	Organization Entity	Region
CALIBRATION AND TESTING	Drake Maintenance - DPM	COLORADO SPRINGS

**Applicable For:** Identifies the Category, Organization Entity and Region that the contract is aligned to. These fields can NOT be changed.

- **Category:** Goods and/or Services the Supplier is providing under the contract.
- **Organization Entity:** The Colorado Springs Utilities entity(s) that can leverage the contract.
- **Region:** Will always default to Colorado Spring.

# Internal Party


INTERNAL PARTY

Name\*  
Colorado Springs Utilities ("Utilities")

Colorado Springs Utilities ("Utilities") an enterprise of the City of Colorado Springs, a Colorado home rule city and municipal corporation

**Internal Party** always identifies as Colorado Springs Utilities

# External Party

EXTERNAL PARTY			
Supplier* Tati UAT	 Referred As Contractor	Supplier Contact* Tannia Salas	Signatory* Tannia Salas

## External Party identifies:

- Supplier
- Supplier Contact
- Supplier Signatory

# Terms

▼ TERMS

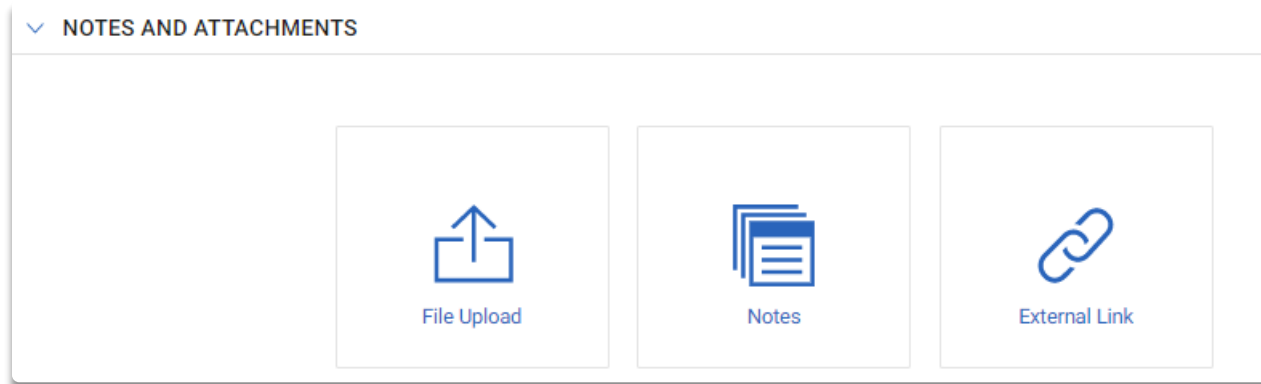
Effective Date  
**05/08/2020**

Currency USD	Payment Term NET 30		
Commencing On Effective Date	Effective Date* 05/08/2020	Remain in effect To Date	Expiry Date* 04/30/2023
Renewal on need basis			

## Terms of the Contract

- **Currency:** Will always default to USD.
- **Payment Terms:** Terms mutually agreed upon by both parties as it relates to the payment of invoices.
- **Commencing On:** Either “Effective Date” or “Last Signature Date”.
- **Effective Date** of the contract is the date the contract is effective, for the purchase of the Goods and/or Services.
- **Remain in effect:** Either “For period of”, “Perpetually” or “To Date”. All these options will be applicable for the term. If “for a period of” is selected, then Effective Period - Is the period of time the contract is effective (i.e., “Effective Period” = 12 / Months).
- **Renewal:** Either “Automatically” or “On Need Basis”. If “Automatically” is selected then Period of renewal, Every = 5, Period = Years, Times = 2. Perpetually = Evergreen. To Date indicates the end date of the contract.

# Notes & Attachments

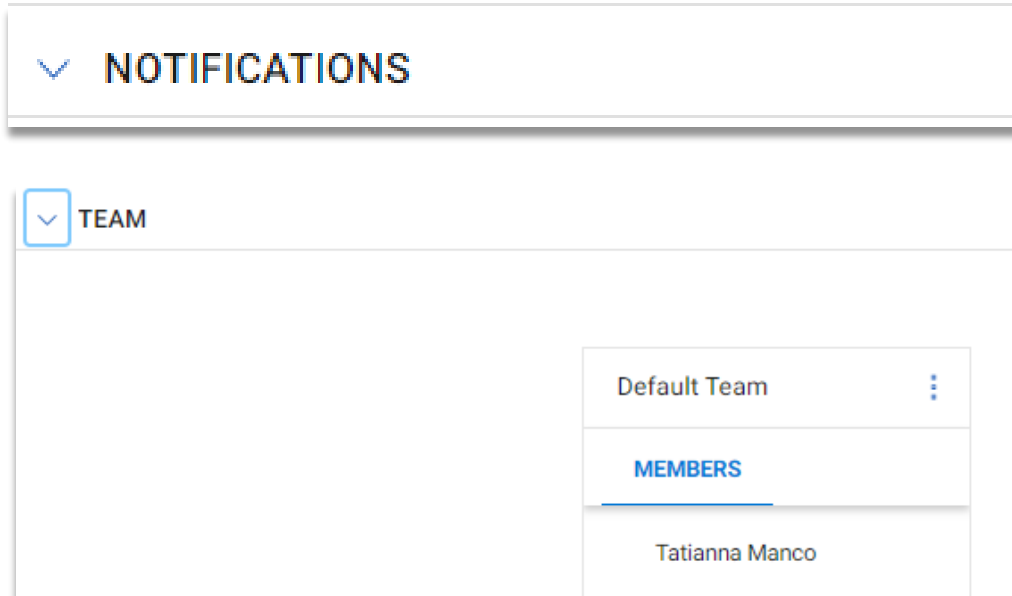


**Notes & Attachments:** These are documents, notes or external links that would support the contractual documents.

- Upload documents
- Attach Notes
- Attach External Links

***NOTE: Suppliers should only upload items to this section after contacting the Colorado Springs Utilities Contract Administrator.***

# Notifications & Team



## Notifications

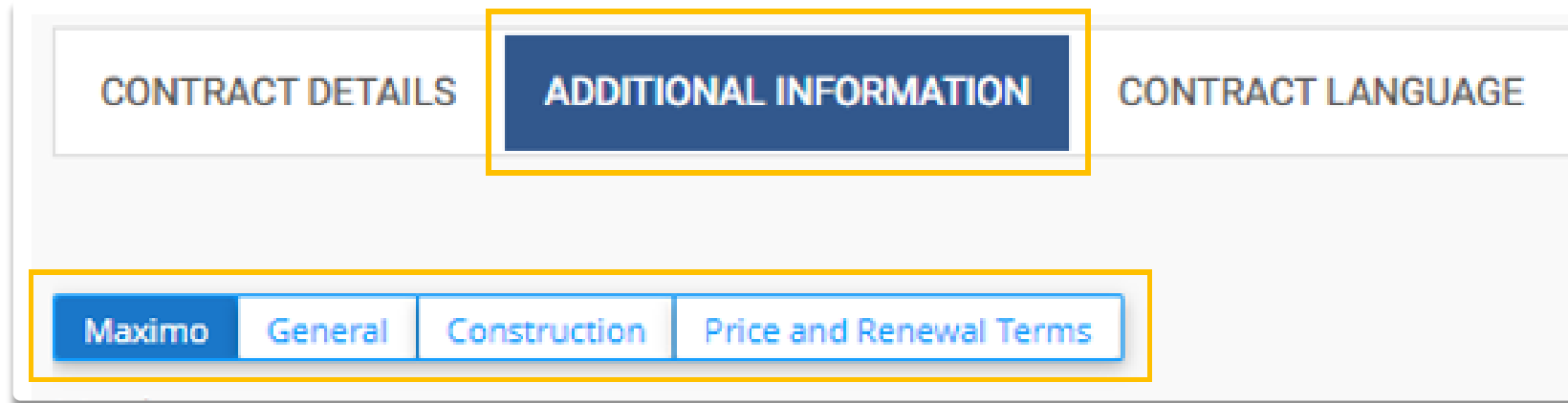
- Informational notifications of when the contract will expire.

## Team

- Identifies the Utilities team that participated in the review and approval of the contract.



# Negotiate and Manage Contract



**Additional Information:** Reflects specific information that is directly tied to the contract. The information will be used by Colorado Springs Utilities for reporting purposes.

- Maximo:** Information (ERP System).
- General:** All General Questions.
- Construction:** All Construction Questions.
- Price and Renewal Terms:** Price Review and number of Renewals to the contract.

# Supplier Review Pending

The screenshot shows a web interface for reviewing a contract. At the top, the title is "Calibration Of North District Test Instrume..." followed by a yellow box containing the text "Supplier Review Pending". To the right are buttons for "COMMENTS", "TRACK STATUS", and "DISCUSSION FORUM", along with a "More" menu icon. Below this is a yellow bar with a link "< BACK TO ACTIVE COPY OF CONTRACT". The main content area has tabs for "CONTRACT DETAILS", "ADDITIONAL INFORMATION", and "CONTRACT LANGUAGE". On the right side of this area are "Copy URL" and "Export" icons. A left sidebar lists sections: "CONTRACT SUMMARY", "BASIC DETAILS", "APPLICABLE FOR", "INTERNAL PARTY", and "EXTERNAL PARTY". The main content area displays "Documents" (Contract Language : 1, Attachments : 0) and "Commercial Terms" (Contract Expiring in : 365 Day(s)). Below these are expandable sections for "BASIC DETAILS" and "APPLICABLE FOR". At the bottom, there is a "PREVIEW" label, a "CANCEL" button, and a yellow box containing "REJECT" and "ACCEPT" buttons.

**Supplier Review Pending:** The supplier can

- **Check Out** the contract for review
- **Redline** the contract as needed
- **Accept**
- **Reject** the contract

# Check Out

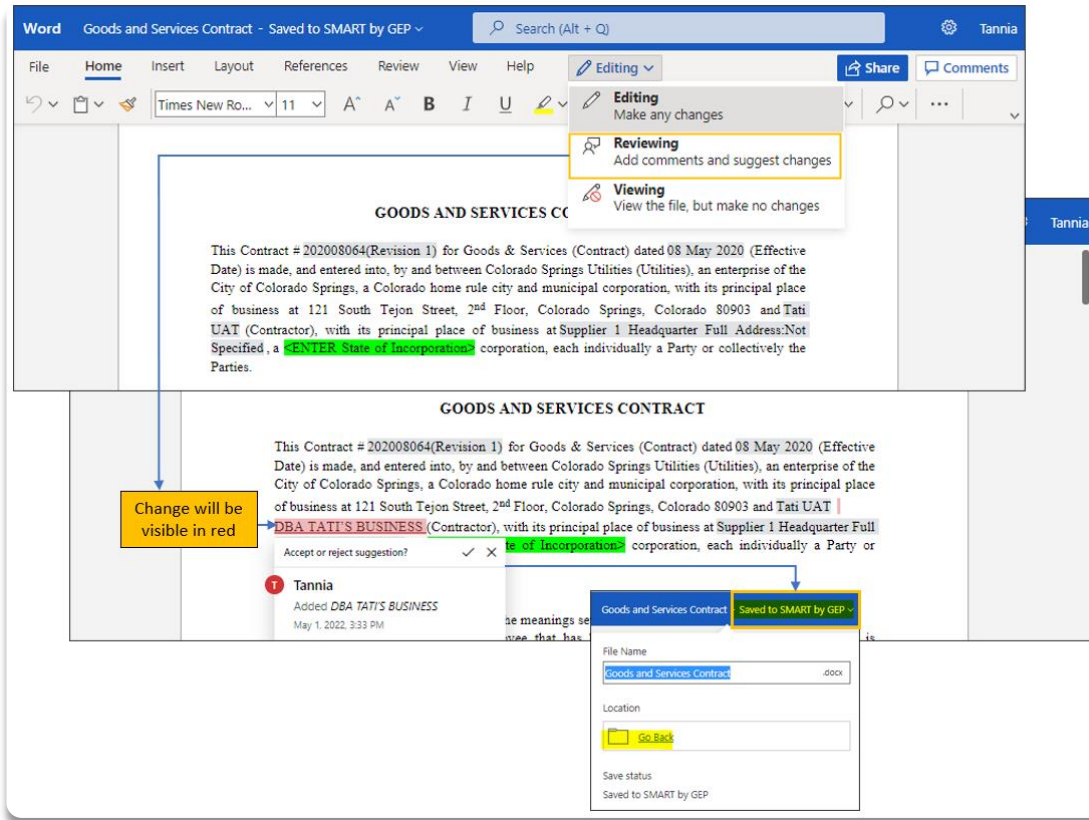
The screenshot shows the 'CONTRACT LANGUAGE' tab selected. Below the navigation tabs, there are four status boxes: 'TOTAL DOCUMENTS 1' (blue), 'DRAFT 1' (teal), 'SIGNED 0' (orange), and 'WORKING COPY 0' (green). Below these are 'AMENDMENT DRAFT', 'SIGNED', and 'WORKING COPY' filters. A table lists documents with columns for Seq. No., Name, Link to Working Copy, Created By, Modified By, Type, Modified On, and Version. The first row shows 'Goods and Services Contract.docx' created by Tatianna Manco on 05/01/2022.

The screenshot shows the document view for 'GOODS AND SERVICES CONTRACT.DOCX'. It displays the version 'Version 1.0' and a note: 'NOTE the version listed before CHECK OUT'. The document content is visible, starting with 'Goods and Services Contract'. At the bottom, there are buttons for 'GO BACK', 'CHECK OUT', and 'OPEN IN MICROSOFT WORD ONLINE'. A 'CHECK IN' dropdown is also visible.

**Review** the contract, go to

- **Contract Language**
- Click on the **Amendment Draft**
- Click on the contractual document(s) listed.
- Click **Check Out**
- Click **Open in Microsoft Word Online**

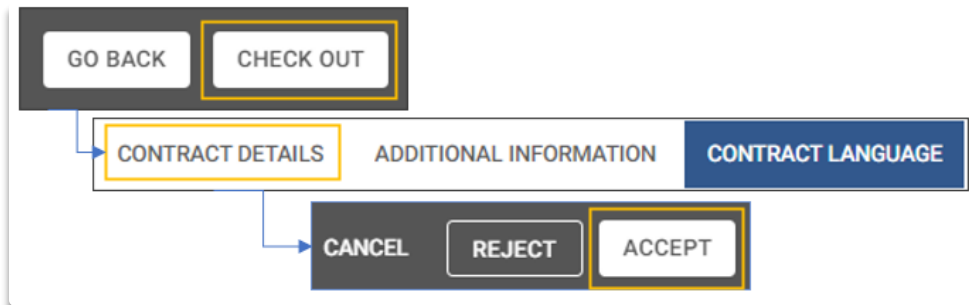
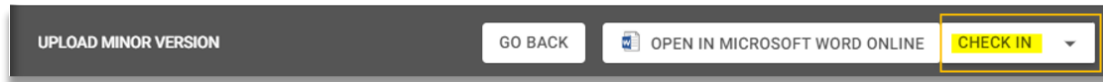
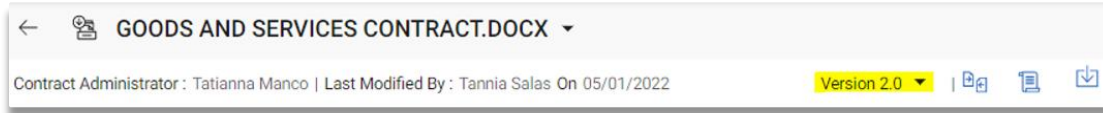
# Redline Contract



## Redline Contract

- Click on **Editing**
- Change to **Reviewing** to track any changes made. Any updates to the contract will be visible in RED ink.
- Click on **Saved to SMART by GEP** once editing is complete
- Click **Go Back**

# Redline Contract



Notice the **Version** on the upper right will change.

- Click **Check In** to complete editing

To finalize

- Click **Go Back**
- Click **Contract Details**
- Click **Accept**

# Reject Contract

CANCEL REJECT ACCEPT

Do NOT wish to enter into a contract with Colorado Springs Utilities|

Upload Document(s) Close Reject

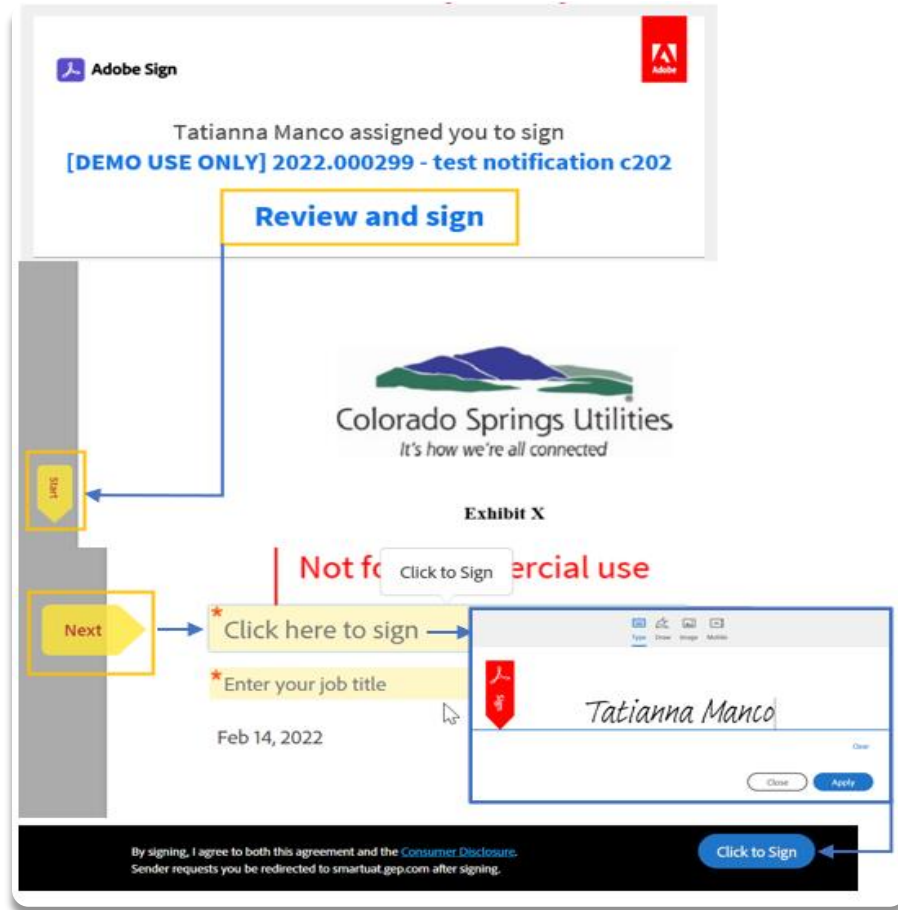
Track Status

Calibration of No... 202008064(Revision 1)	Created By Tatianna Manco	Created on Apr 30 2022
	Submitted ... May 2 2022	Supplier Rejected

**Reject:** If the supplier does not wish to continue with the contractual document, the supplier has the option to the reject contract.

- Click **Reject**
- Enter reason in the **Comments**
- The **Track Status** will reflect the rejection for the Buyer

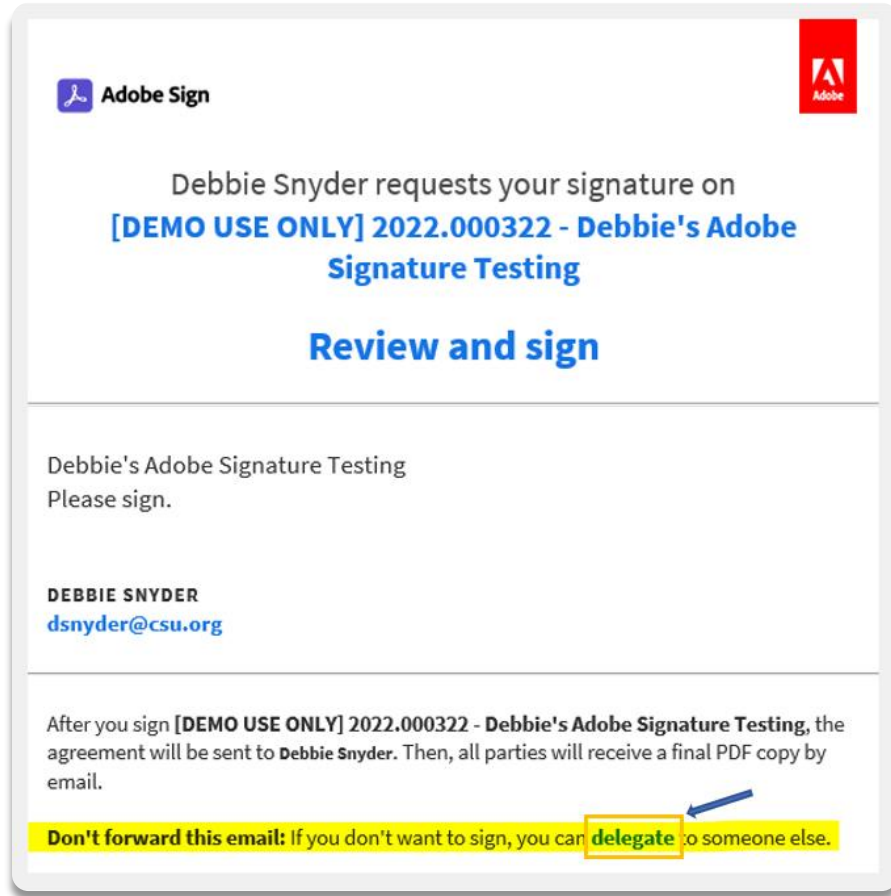
# Sign Contract



Once the document(s) are in a final version, the Sourcing Owner will Send for Supplier Signature.

- Supplier will receive a notification email prompting them to review and sign
- Click on **Review and sign**
- Click on **Start**
- Click on the **Signature Block**
  - Type, draw or upload a signature
- Click **Apply** and **NEXT**
- Click on **Title box** to enter your title
- Click on **Click to Sign**

# Sign Contract



## Changing Contract Signatory

- If the contract was sent to the wrong person, you will be able to send it to the appropriate signatory from your AdobeSign email.
- Click on **Delegate** to send to the company's authorized signatory






Colorado Springs Utilities  
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# **GEP SMART**

Responding to a Sourcing Event

# Invitation Notification

CS UTILITIES: Invitation to Participate in Supplier Day Sourcing Event

 smartuat@gep.com  
To: Tatianna Manco

Retention Policy 3 Year delete (3 years) Expires 5/2/2022  
 This sender smartuat@gep.com is from outside your organization.

**[External Email - Be careful! DO NOT open attachments or click links from unknown senders or unknown email addresses.]**

Tannia Salas  
You have been invited to participate in a sourcing event by ColoradoSpringsUtilities for CHEMICALS AND GASES category.

**Event Name:** *Supplier Day Sourcing Event*  
**Event Start Date Time:** 5/3/2022 02:00:00 PM Mountain Standard Time  
**Event End Date Time:** 5/3/2022 03:00:00 PM Mountain Standard Time

To access the sourcing event [Click Here.](#)

**Basic Instruction:**

1. If you are seeing this email for the first time, you need to create password in order to participate. Please [click here](#) to generate/reset password. Your user name is **Tannia**.
2. After you create password you can log into SMART and select event to participate.
3. Please note, the time zone of the Event above is Mountain Standard Time. You may be in a different time zone and therefore, you must make sure you are logged on at the correct time so you do not miss the event.

If you have any questions please contact us on [support@gep.com](mailto:support@gep.com) or call our helpline number mentioned below. Our customer support team would help you to get started.

When an RFX is published the supplier **Primary Contact** will receive an **email invitation**.

- Supplier(s) will be required to click on the link within the email to navigate to the Sourcing Event.

RFX = Request for Quote

RFI = Request for Information

RFP = Request for Proposal

IFB = Invitation for Bid

# Supplier Action Pending



The supplier will have an **Action Pending** listed under **My Tasks**

- Click on **My Tasks**
- Click on **Action Pending**
- Click on **RFX**
- Click on the RFX Event listed

# Assign Ownership

000292-May2022 (Test) New Response closing in 0d 0h 26m 46s Discussion Forum


Manage Contacts - Tati UAT Search Add New Contact

Name & Contact	User's Role	Updated By	Email Sent On
Tannia Salas tmanco@csu.org   -	Primary Responder	Buyer	05/02/2022 6:49 PM
Cristian Manco cmanco@csu.org   5037240000	No Access		

Change Ownership  
Download Discussions  
Upload and Download Log

CANCEL DONE

**Assign Ownership:** The Primary contact has the option to assign ownership of the event to another member and remain as a **Collaborator**, a **Viewer** or have **No Access**.

- Click on 
- Click on **Change Ownership**
- Change the **Primary Responder** to another option
- Give access to any contact listed by selecting **Primary Responder** from the drop down

**Note:** *There can ONLY be 1 Primary Responder. All other options can be assigned to multiple times.*

# Review Guidelines

The screenshot shows a web interface for reviewing guidelines. At the top right, there is a 'Response closing in' timer showing '0d 0h 5m 17s' and a 'Discussion Forum' button. Below this, a section titled 'GUIDELINES PENDING ACCEPTANCE' contains an information icon and the text 'Accept the guidelines listed in this section in order to participate in the event.' To the right of this text is a yellow button labeled 'Download all Guidelines'. Below this is a list of guidelines, with the first item 'Accept General Guidelines - Invitation for Bid (IFB) - Construction' having a checked checkbox.

**Review Guidelines:** The Primary Respondent will have to option to review the Guidelines and decide if they will Decline or Accept the invitation.

- Click on the **Guideline Link** to view a pop up of the Guidelines or click on **Download all Guidelines** to review

# Decline Invitation

▼ GUIDELINES PENDING ACCEPTANCE

ⓘ Accept the guidelines listed in this section in order to participate in the event. [Download all Guidelines](#)

I Accept General Guidelines -Invitation for Bid (IFB) - Construction

CANCEL **DECLINE INVITATION** ACCEPT GUIDELINES

**Decline to Participate:** Once the Guidelines are reviewed, the supplier can choose to Decline the invitation.

- Click **Decline Invitation** and do not check the boxes if not participating

**Note:** *If the Supplier Declines to participate, they will no be able to view any other documents*

# Accept Invitation

New

Response closing in 0d 0h 5m 17s

Discussion Forum

GUIDELINES PENDING ACCEPTANCE

Accept the guidelines listed in this section in order to participate in the event. [Download all Guidelines](#)

Accept General Guidelines - Invitation for Bid (IFB) - Construction

CANCEL DECLINE INVITATION ACCEPT GUIDELINES

**CONFIRMATION**

By clicking "ACCEPT GUIDELINES" you agree to all the mandatory terms and conditions included in the "GUIDELINES" section. Do you wish to proceed?

NO YES

My organization wishes to participate in this event

CANCEL DECLINE INVITATION CONFIRM PARTICIPATION

**Accept Invitation:** Once the Guidelines are reviewed, the supplier can **Accept** to participate in the sourcing event. The Guidelines must be accepted before the **Response Closing Time** ends or the Supplier will not be able to participate.

- Check on **Accept General Guidelines** to participate, and click **Accept Guidelines**
- Click YES to the Confirmation pop up
- Check **My organization wishes to participate in this event**, Click **Confirm Participation**

# Sourcing Event Sections

BASIC DETAILS
EVENT TIMELINES
BUYER CONTACT INFOR...
TEAM MEMBERS
GUIDELINES
<b>CONTRACT TERMS</b>
QUESTIONNAIRES
PRICE SHEETS

Sourcing event sections contain information pertinent to respond to the sourcing event.

- **Contract Terms** are not visible until the supplier accepts participation



# Basic Details

✓ BASIC DETAILS

Event Name  
000292-May2022 (Test)

Event Description  
Test Sourcing Event

Event Type Request for Information	Event Currency USD	Event Overview -
Category* CHEMICALS AND GASES	Business Unit* Colorado Springs Utilities	Region* AMERICAS

## Basic Details section reflects

- Event Name
- Event Description
- Event Type (i.e., RFI, RFP, RFQ, IFB)
- Event Currency - Will default to USD
- Event Overview will not be used at this time
- Category - Relates to the category the Goods and / or Services this RFP aligned to
- Business Unit - Identifies Utilities Business Units
- Region - Will always default to Colorado Springs

# Event Timelines

EVENT TIMELINES Gantt View

Time Zone: Mountain Standard Time(UTC-6:00)

Name	Start Date & Time	End Date & Time	Duration
Response Timeline	05/02/2022 6:29 PM	05/02/2022 11:05 PM	4h 36m

## Event Timelines section reflects

- **Time Zone** of the Event
- **Start Date & Time:** Supplier start time, to respond to the questionnaire and submit price sheet.
- **End Date & Time:** Supplier end time, to submit the questionnaire and price sheet.
- **Duration:** How long the Supplier has to submit their response

*Note: If the supplier does not Submit before the End Date & Time, they will no longer be able to participate in the event.*

# Buyer Contact Information

## BUYER CONTACT INFORMATION (1)


Name	Designation	Email Address	Contact Number
Tatianna Manco		<a href="mailto:tmanco@csu.org">tmanco@csu.org</a>	(719) 668-7360

### **Buyer Contact** Information section reflects

- Name of the Sourcing Owner at Utilities
- Designation (Their Role)
- Email Address
- Contact Number

# Team Members

TEAM MEMBERS(SUPPLIER CONTACTS) [Manage Contacts](#)

Name	Viewer	Collaborator	Invitation Status
 Tannia Salas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Invited On 05/02/2022 6:49 PM
Cristian Manco	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Invited On 05/02/2022 7:47 PM

**Team Members** section reflects the Supplier contacts

- Name of the Sourcing Owner at Utilities
- Designation (Their Role)
- Email Address
- Contact Number

# Guidelines

▼ GUIDELINES (1) Download

<input type="checkbox"/>	Guideline Name	Guideline Type	Accepted By	Accepted On
<input type="checkbox"/>	<a href="#">Invitation for Bid (IFB) - Co...</a>	General Guidelines	Tannia Salas	05/02/2022 7:56 PM

**Guidelines** section contains the Guidelines that the Supplier accepted at the beginning of the event

- To view Guidelines, proceed to click on the Guideline document name

# Contract Terms

CONTRACT TERMS

I confirm that I have read all the contract terms of this event

Name	Author	Modified By	Modified On	Status	Version
<a href="#">Goods and Services Contract</a>	Tatianna Manco	Tatianna Manco	05/02/2022 6:49 PM	Check in	1


**Contract Terms** section contains the contractual documents as it relates to the sourcing event

- Click on the document name to review the contract terms
- The supplier has the option to **Check Out** and **Redline** the document
- Click on **I confirm I have read...** to proceed

**Note:** *If the Supplier does not have any changes to the documents, they can proceed to move onto the next section*

# Questionnaires


QUESTIONNAIRES (1) Upload All Download All

Questionnaire Name	Evaluation Type	Last Modified by	Last Modified On	Questions	Response Completion %	Actions
<a href="#">IFB-Materials</a>	Technical	Tannia Salas	05/02/2022 10:45 PM	5	<div style="width: 100%; height: 10px; background-color: green;"></div> 100.00%	

**Questionnaires** section the Supplier respond to all questions in the questionnaire

- Click on the document name to open
- **Evaluation Type:** Questionnaire will also show the Evaluation Type
- **Last Modified by:** Lists Supplier contact that updated the questions
- **Last Modified On (Date)**
- **Questions:** # of Questions that the Supplier needs to respond
- **Response Completion %** - Percentage must be 100% to Submit

# Price Sheet

PRICE SHEETS (1)					More
Price Sheet Name	Last Modified By	Last Modified On	Response Completion %	Actions	
COST ESTIMATION TEST	Tannia Salas	05/02/2022 10:51 PM	<div style="width: 100%; height: 10px; background-color: green;"></div> 100.00%		

**Price Sheet** section, the Supplier will submit their quote via the Price Sheet(s).

- **Price Sheet Name**
- **Last Modified by** - Lists Supplier contact that updated the price sheet
- **Last Modified On (Date)**
- **Response Completion %** - Percentage must be 100% to Submit



# Price Sheet

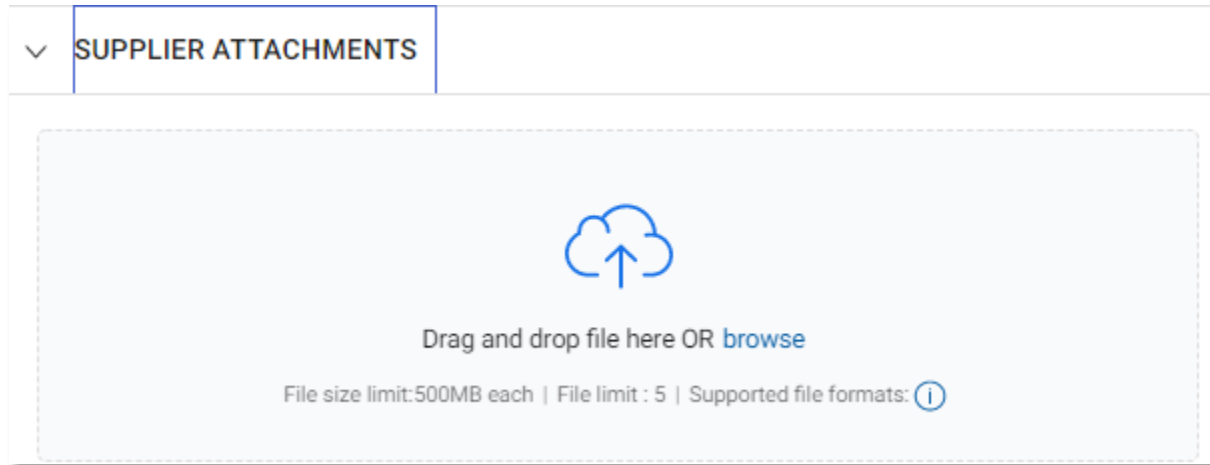
	A	B	C	D	E	F	G
1	*Intent to Bid	*Item Name	*Item Number	*Volume	*Unit	*Price Per Unit...	Total Price (USD)
2	Yes	LAMP, INDICATOR, MINI, 28...	003-840-024	100	BX : Box	USD 5.00	USD 500.00
3	No	Transformer Type A	003-805-803	1	EA : Each		-
4	Yes	Transformer Type B	003-805-802	1	EA : Each	USD 20.00	USD 20.00
5	Yes	Transformer Type C	003-805-806	1	EA : Each	USD 15.00	USD 15.00
6	Yes	Transformer Type D	196-050-149	1	EA : Each	USD 20.00	USD 20.00
7							USD 555.00

CANCEL DONE

**Price Sheet** the Supplier will enter the Price Per Unit for each line item

- **Intent to Bid** – Answer Yes or No for each item
- **Item Name**
- **Item Number** – also referred to as Part Number
- **Volume**
- **Unit of Measure**
- **Total Price** = Volume \* Price Per Unit
- Click **DONE** once complete

# Attachments



**Supplier Attachments** the Supplier will be able to access documents for review as they are responding to the various RFX sections

- Drawings
- Statement of Work
- Material Specifications
- Etc.

# Discussion Forum

000292-May2022 (Test) Participation Confirmed Response closing in 0d 0h 12m 14s Discussion Forum

DISCUSSION FORUM - 000292-MAY2022 (TEST) Refresh Download Create

000292-May2022 (Default) Edit

SUPPLIER MEMBERS Tannia Salas

Tatianna Manco created this discussion on 5/2/2022 06:07 PM

ADD ATTACHMENTS POST

**Discussion Forum** is used as a means of communication between the Supplier and the Sourcing Owner.

- Enter questions in the open text field and click **Post**
- Utilities Sourcing Owner will respond with an Addendum

# Submit

Validate

CANCEL

SUBMIT RESPONSE

## Submit

- Check **Validate** to see any missing fields or errors
- Click **Submit Response** to complete
- If needed the Supplier can click on **Withdraw Responses** before the timeline ends, to make edits or changes and Re-Submit

***Note: Responses MUST be submitted before the Response End Time, or the supplier will not be able to continue in the sourcing event***

# Q & A

