



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

GEP SMART – Supplier Training

Agenda

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2. How to sign in? (Slide 6)
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GEP SMART – What is it?

GEP SMART Tool

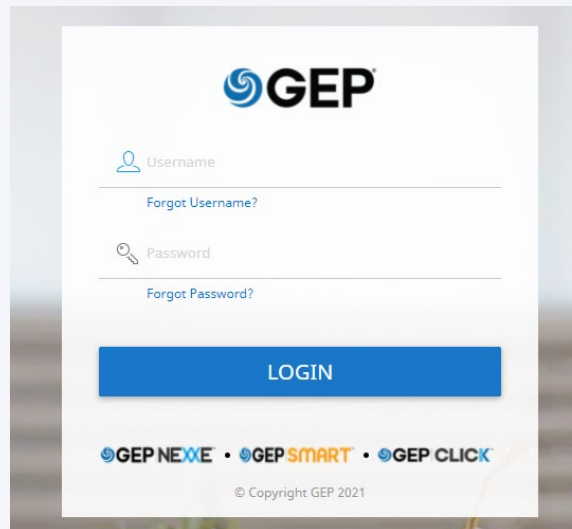
The move to GEP SMART allows us to replace a number of legacy systems while streamlining the sourcing and contracting process. The benefits of the new system will include:

- 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

How to sign in?

How to sign in?

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



The image shows a login page for GEP. 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 NEXE', 'GEP SMART', and 'GEP CLICK', each with its own icon. At the very bottom, there is a small copyright notice: '© Copyright GEP 2021'.

Not Registered with CS Utilities Yet?

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

Colorado Springs Utilities is in the process of transitioning from Bidnet/Rocky Mountain E-Purchasing to GEP SMART for our sourcing and contracting tool. Your company must be registered in GEP SMART to view or participate in our sourcing events once the new system is live. There is no cost to register, and it only takes a few minutes, but is critical for our partnership going forward.

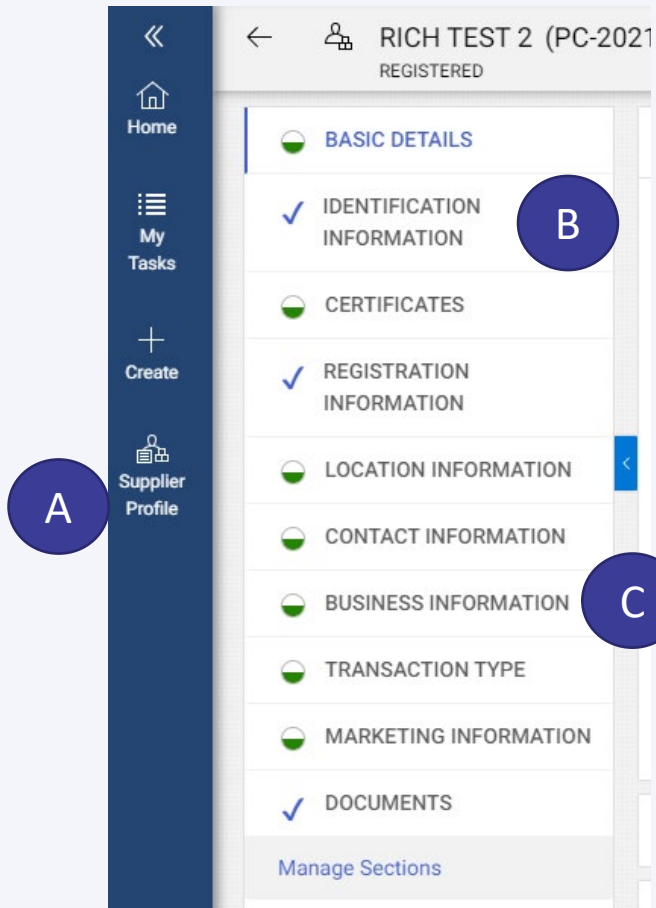
To begin the process, please email Colorado Springs Utilities at SupplierOnboarding@csu.org with your

- **Company Name**
- **Primary Contact Name**
- **Email**
- **Phone Number**
- **FedTax ID or Copy of Your W9**

Once we receive your information, we will create you as a supplier in the system and send you an email with the link for you to complete the registration information. If you have any questions about the process, please send an email to procurement@csu.org.

Supplier Profile

Supplier Profile



- A. Once you are signed into GEP Smart make sure that your Supplier Profile is current.
- B. Checkmarks indicate that the information within the section has been fully completed
- C. A circle that is partially filled indicates that there could be missing information

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

If you have any questions about the process, please send an email to procurement@csu.org.

Supplier Module

Supplier Module

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Catalog Sourcing Contract Purchasing Invoice **Supplier** A

Documents B C

FORM SCORECARD

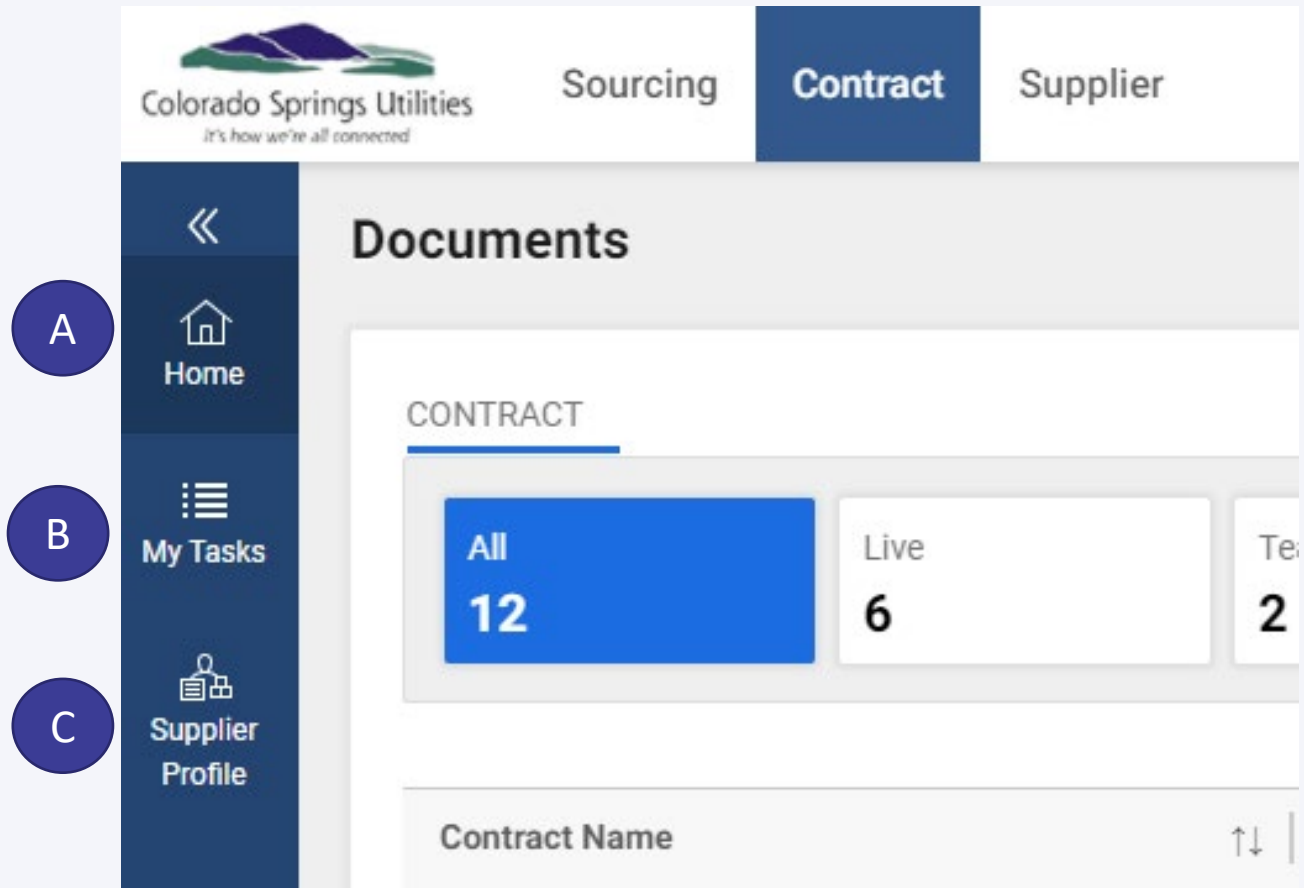
All 1 Published 1

Form Name	Form Type	Recurrence	Frequency
Primary Registration Form	Primary Registration Form	Non-Recursive	NA

- A. Under the tab Supplier, there are two sections
- B. Under the Form section this will reflect the Supplier's Primary Registration Form that was submitted by the Supplier
- C. As it relates to the Scorecard section, we will be utilizing this feature at a later point in time. However, 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

Left Hand Side Task Bar

Left Hand Side Task Bar

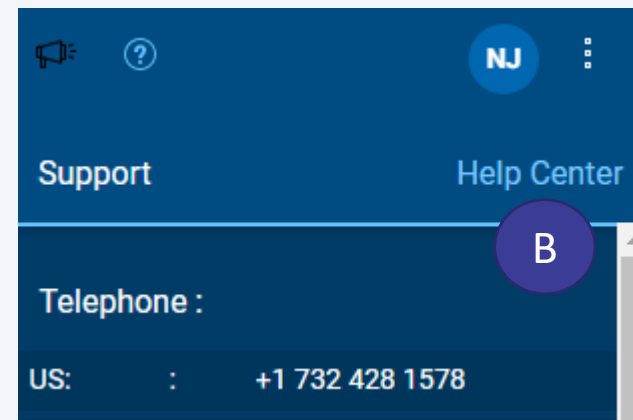
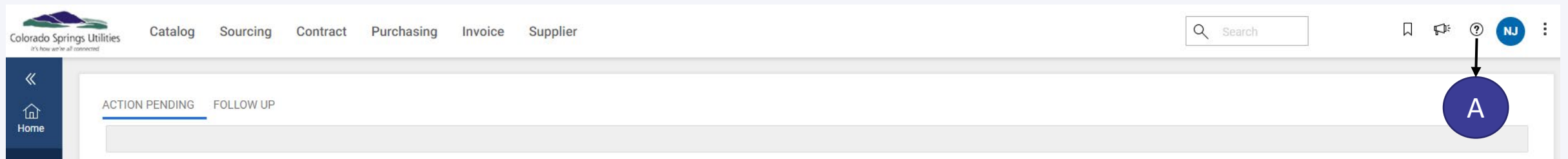


- As it relates to the task bar the following options are available
- A. Home – Will take you to your default home page (i.e., Contract)
 - B. My Tasks - Will show Action Pending and Follow Up for specific actions or tasks that the Supplier must complete
 - C. Supplier Profile – As discussed on Slide 10

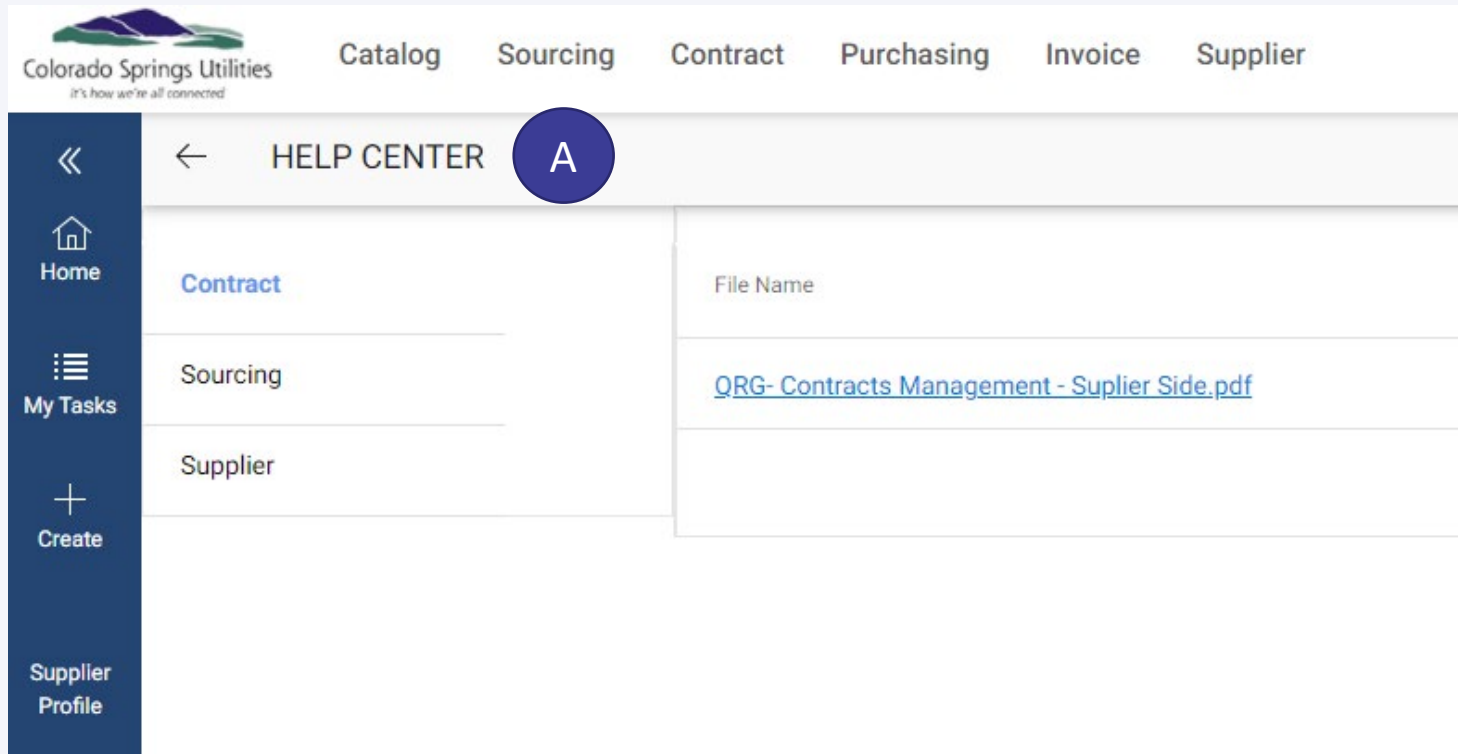
Help Center

Help Center

- A. To access the Help Center, click on the Help Center icon
- B. Then click on Help Center



Help Center

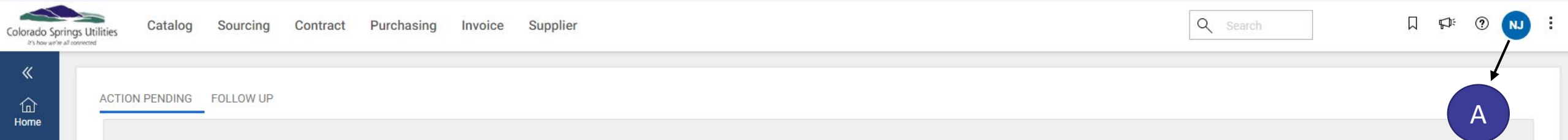


A. This will allow the Supplier to access documents that will assist the Supplier with questions or “How To...” as it relates to the Contract, Sourcing or Supplier modules.

Personal Profile

Personal Profile

A. To maintain your personal profile, click on your initials



Personal Profile

Settings

General

Account Settings

First name* Nancy	Last name* Jones
User Email* rnorton@csu.org	Username rlnort2
Extension 1	Extension 2
Phone 1 7199851651	Phone 2
Persona Supplier Contact	View Activities
Country Code +1	Mobile Number ⓘ 7199851651

[Change Password](#)

Regional Settings

Time Zone (UTC-06:00) Mountain Time (US & ...	Language English
Country Please Select	

A. This will allow you to update your personal information



Electronic Signature Settings

Enable Signature

AVAILABLE FOR

Contract Procurement

Create Signature
 Upload Signature

Buyer 1 Signature 20

Buyer 1 Signature

[Set Signature Password ⓘ](#) [Forgot password? Click here to reset. ⓘ](#)

[Cancel](#) [Save](#)

To Log Out

Log Out

- A. To Log Out click on the 3 dots
- B. Click on the red Log Out button

The screenshot displays the Colorado Springs Utilities web application interface. At the top left is the logo with the tagline "It's how we're all connected". The main navigation bar includes links for "Catalog", "Sourcing", "Contract", "Purchasing", "Invoice", and "Supplier". A search bar is located on the right side of the navigation bar. Below the navigation bar, there are two tabs: "ACTION PENDING" and "FOLLOW UP". On the right side of the page, a user profile dropdown menu is visible, containing a "NJ" profile icon and a three-dot menu icon. A blue circle labeled "A" points to the three-dot menu icon. A red button with a power icon is also visible, and a blue circle labeled "B" points to it.

How to view, negotiate & manage a contract

How to view, negotiate & manage a contract

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Sourcing **Contract** Supplier

Documents

CONTRACT

All 13 Live 7 Team Review Pending 2

Contract Name	Contract Number
Supplier Training Aug 3rd	2021.000092

- A. Click on the Contract tab
- B. When the Contract module page comes up the metrics at the top reflect how many contracts the Supplier has in Total, Live, Team Reviewed
- C. To view the contract, click on the Contract Name

How to view, negotiate & manage a contract

The screenshot shows a mobile application interface for viewing a contract. At the top, the title is 'Supplier Training Aug 3rd' with a 'Live' status indicator. Below the title are three tabs: 'CONTRACT DETAILS' (selected), 'ADDITIONAL INFORMATION', and 'CONTRACT LANGUAGE'. On the left side, there is a vertical menu with the following items: 'CONTRACT SUMMARY', 'BASIC DETAILS', 'APPLICABLE FOR', 'INTERNAL PARTY', 'EXTERNAL PARTY', 'TERMS', 'NOTES AND ATTACHME...', 'NOTIFICATIONS', and 'TEAM'. A blue circle with the letter 'A' is positioned to the left of this menu, with a bracket pointing to the entire list. On the right side, the main content area displays a 'Documents' section with 'Contract Language : 4' and 'Attachments : 1'. Below this is a 'BASIC DETAILS' section containing 'Contract Name* Supplier Training Aug 3rd' and 'Description Supplier Training Aug 3rd'. At the bottom of the main content area, there is a list of expandable sections: 'APPLICABLE FOR', 'INTERNAL PARTY', 'EXTERNAL PARTY', 'TERMS', 'NOTES AND ATTACHMENTS', 'NOTIFICATIONS', and 'TEAM', each with a right-pointing chevron.

A. When you open the contract name you will see all the various sections of the contract on the left-hand side

How to view, negotiate & manage a contract

A CONTRACT DETAILS ADDITIONAL INFORMATION CONTRACT LANGUAGE

B BASIC DETAILS

C Contract Name*
123 Company-000169-May2021

D Contract Number*
2021.000149

E Document Type*
Goods & Services Contract

F Contract Type*
Master Agreement

G Contract Administrator
Rich Norton Jr.

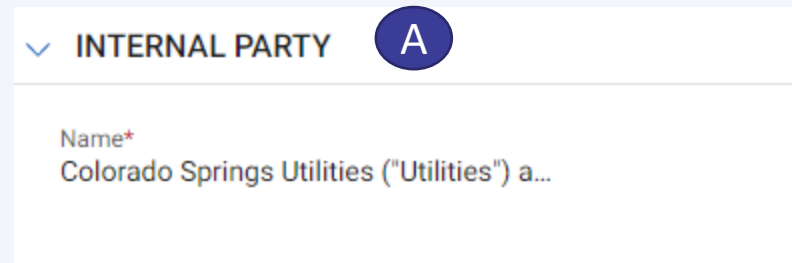
H Description
5 year agreement with 2 - 5 year renewal periods with 123 Company for supplying 3 phase transformers across the enterprise.

I APPLICABLE FOR

Category	Organization Entity	Region
TRANSFORMERS	Drake Power Plant - D	COLORADO SPRINGS

- A. After clicking the “Document Name” it will take you to the **Contract Details** page
- B. Under **Basic Details** proceed to
- C. **Contract Name** will be as defaulted: **“Supplier Name-Contract #-Contract Initiation Date”**
- D. **Contract Number** – Is the unique number aligned to this contract – Is a number created by GEP
- E. **Document Type** – Is the contract template used to create this contract
- F. **Contract Type:**
 - A. Will be a **Sub Agreement** if it relates to a Task Order, Amendment, Change Order;
 - B. Will be a **Non-Disclosure Agreement** for NDA’s;
 - C. otherwise, it will be **Master Agreement**
- G. **Contract Administrator** – Is the Colorado Springs Utilities Sourcing Owner
- H. **Short description** of what this contract relates to
- I. **Applicable For** identifies the Category, Organization Entity and Region that the contract is aligned to. These fields can NOT be changed. Category refers to the Goods and/or Services the Supplier is providing under this contract; Organization Entity is the Colorado Springs Utilities entity(s) that can leverage this contract; Region will always default to Colorado Springs

How to view, negotiate & manage a contract




INTERNAL PARTY **A**

Name*
Colorado Springs Utilities ("Utilities") a...

- A. Proceed to the section **Internal Party**
- B. **Name** - will always be Colorado Springs Utilities

How to view, negotiate & manage a contract

▼ **EXTERNAL PARTY**

Supplier* Rich Test 1		Referred As Contractor	Supplier Contact* Jim Smith	Signatory Jim Smith
--------------------------	---	---------------------------	--------------------------------	------------------------

- A. Proceed to the section **External Party**
- B. **Supplier** – Legal name of the Supplier
- C. **Referred As** – will always be Contractor
- D. **Supplier Contact** – the person from the supplier that will facilitate the negotiation of this contract
- E. Signatory - The person from the Supplier that is allowed to execute/sign this contract

How to view, negotiate & manage a contract

TERMS **A**

Effective Date
07/01/2021

Currency USD **B** Payment Term NET 30 **C**

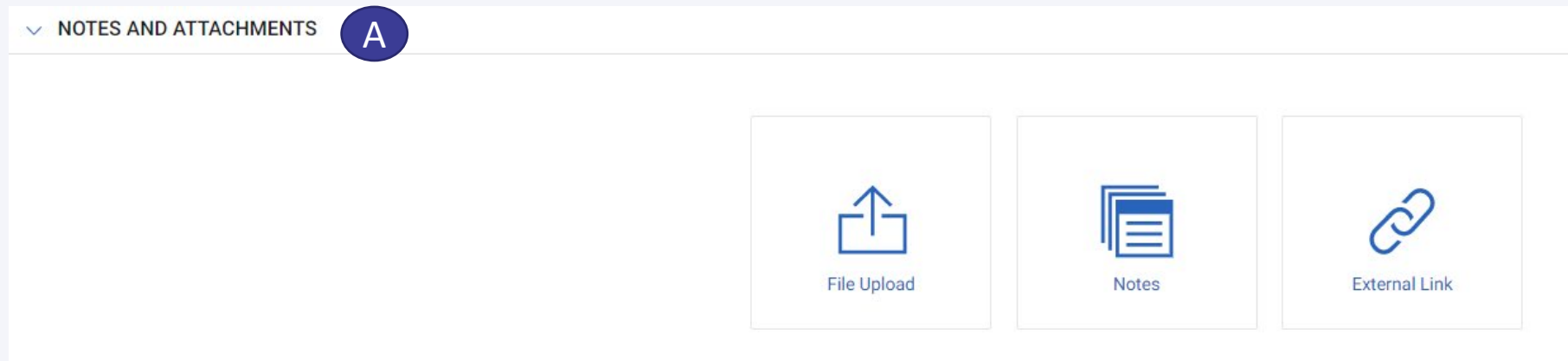
Commencing On Effective Date **D** Effective Date* 07/01/2021 **E** Remain in effect for period of **F** Effective Period* 5 **H** Year(s)

Renewal automatically **I** Every 5 **J** Period Year(s) Times 2

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

How to view, negotiate & manage a contract

A. Under the section Notes and Attachments, the Supplier can 1) Upload documents; 2) Attach Notes; 3) Attach External Links; As Needed. These are documents, notes or external links that would support the contractual documents.

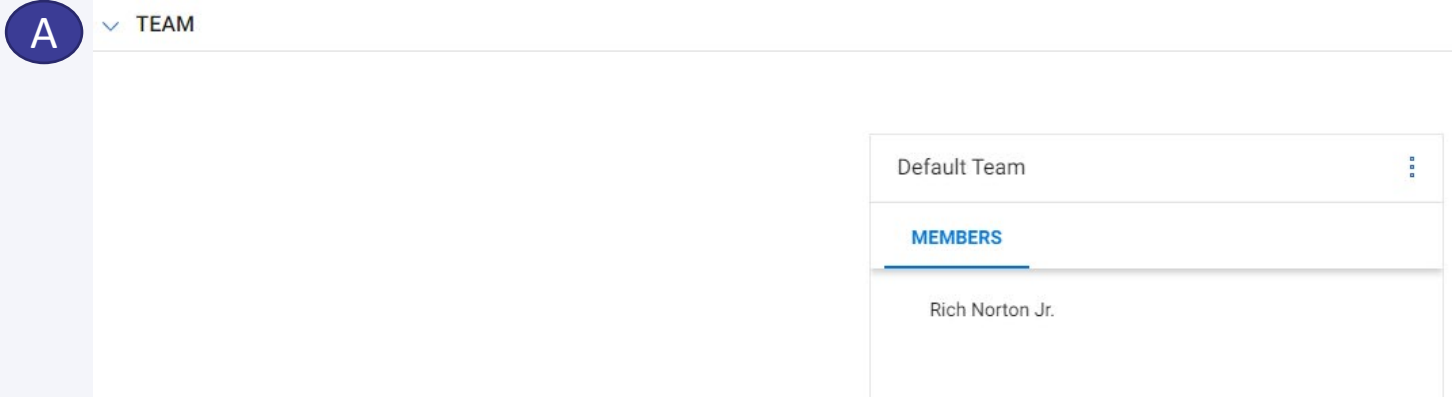


How to negotiate & manage a contract

A. Notifications - This section will inform the Supplier for when the contract is going to expire

NOTIFICATIONS A							Delete Notification(S)	Add Notification
<input type="checkbox"/>	Name	Event	Notify To	Added By	Next Due On	Status		
<input type="checkbox"/>	Contract AutoRenewal : 90 days..	Expiry Date	Attorney, Administrator, Authorized Signatory, Sponsor	System Admin	03/29/2026	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Contract AutoRenewal : 30 days..	Expiry Date	Attorney, Administrator, Authorized Signatory, Sponsor	System Admin	05/30/2026	<input checked="" type="checkbox"/>		

How to negotiate & manage a contract



A. Team - Identifies the Utilities' team that participated in the negotiation of the contract

How to negotiate & manage a contract

← 123 Company-000169-May2021 Draft

A

CONTRACT DETAILS | ADDITIONAL INFORMATION | CONTRACT LANGUAGE

B

Maximo | General | Construction

Maximo

Populate Maximo Contract number*

Populate Maximo Task Order number*

A. Under the Additional Information tab
B. This will reflect specific information that is directly tied to this contract. In this case specific Maximo information (ERP System)

This information will be used by Utilities for reporting purposes.

How to negotiate & manage a contract

← 123 Company-000169-May2021 Draft

A

CONTRACT DETAILS | ADDITIONAL INFORMATION | CONTRACT LANGUAGE

- A. Additional Information
- B. All General questions

B

Maximo | General | Construction

General

Select the Pricing Structure as defined per the contract*

Firm Fixed Price (FFP) ▼

Populate release limit/value as defined in the Statement of Work document*

100,000

Will this be an all Division contract?*

Yes ▼

Type of Contractor Minimum Safety Requirements*

General Services ▼

Are services being conducted at a NERC facility? The North American Electric Reliability Corporation (NERC) is a not-for-profit international regulatory authority whose mission is to assure the effective and efficient reduction of risks to the reliability and security of the grid.*

No ▼

Is GASB 86 & 97 applicable? GASB 86 & 97 pertains to Leases. If the Lease is for a non-financial asset (e.g. land, buildings, vehicles, and equipment), or software leases (SBITAs) and lease term is longer than 12 months and the total value of lease over the lease term is \$100,000 or greater please select Yes.*

No ▼

Is FAS 133 applicable. Statements of Financial Accounting Standards 133, also known as FAS 133, is an accounting standard that requires companies to calculate all assets and liabilities on their balance sheet at fair value.*

No ▼

Enter the Warranty Term mutually agreed upon by both parties (i.e. 5 year from installation date) or Enter Not Applicable*

5 years

Will any Federal or State grants be associated with this Contract/Task Order?*

No ▼

Will a City of Colorado Springs Sales and Tax Use refund be applied from the City? This is applicable to Construction Contracts in excess of \$5 million dollars in value. All construction materials purchased or used within the City are subject to City Sales/Use Tax. There is no City exemption for Work performed for government, religious or charitable organizations, since the contractor and/or subcontractor is the user of all tangible personal property used or consumed within City. If City sales tax is not paid, City use tax is due. State and County taxes are exempt if the Contractor has applied for exemption from the State and County (DR0172 form).*

No ▼

Enter IT Service Now Case Number (Enter N/A if Not Applicable)*

NA

If the contract has been terminated, select the appropriate response*

Cause ▼

Can the Pcard be used for the purchase of the goods and/or services aligned to this contract?*

No ▼

Does the Davis Bacon Act apply to this Contract/Task Order? The Davis-Bacon Act of 1931 is a United States federal law that establishes the requirement for paying the local prevailing wages on public works projects for laborers and mechanics. It applies to contractors and subcontractors performing on federally funded or assisted contracts in excess of \$2,000 for the construction, alteration, or repair of public buildings or public works.*

No ▼

How to negotiate & manage a contract

← 123 Company-000169-May2021 Draft

A

CONTRACT DETAILS | ADDITIONAL INFORMATION | CONTRACT LANGUAGE

- A. Additional Information
- B. All Construction questions

B

Maximo | General | Construction

Construction

Excavation required?*

No ▾

Will Retainage be withheld from this Contract/Task Order?*

No ▾

Is Bonding required for this Contract/Task Order? Construction bond is a type of surety bond used by investors in construction projects to protect against disruptions or financial loss due to a contractor's failure to complete the project or to meet contract specifications. There are different types of Bonds. A payment bond is a surety bond posted by a contractor to guarantee that its subcontractors and material suppliers on the project will be paid. A performance bond, also known as a contract bond, is a surety bond issued by an insurance company or a bank to guarantee satisfactory completion of a project by a contractor. A blanket bond is used when the Contract issued is a release based contract and the annual value of construction will exceed \$100,000.*

No ▾

Select the appropriate Bonding requirement for this contract if applicable?*

Performance ▾

How to negotiate & manage a contract

← 123 Company-000169-May2021 Draft

CONTRACT DETAILS ADDITIONAL INFORMATION **CONTRACT LANGUAGE** A

DRAFT SIGNED WORKING COPY

ⓘ During Contract Approvals, multiple language documents get combined into a single PDF.

Rearrange Data Download Selected Delete Selected Download Plugin To Draft Offline Add Contract Language

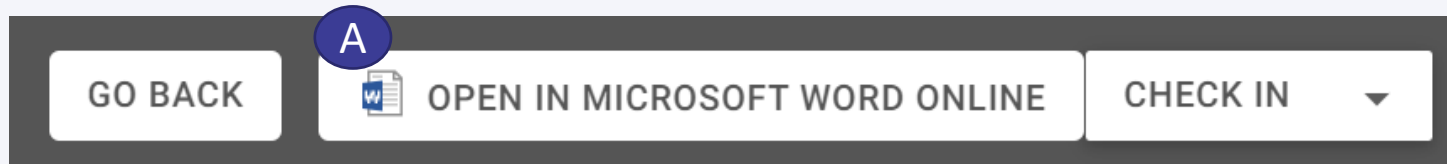
Seq. No.	<input type="checkbox"/>	Name	Created By	Modified By	Type	Modified On	Version
1	<input type="checkbox"/>	RFX_Goods and Services Contract.docx B	Rich Norton Jr.	Rich Norton Jr.	Newly Added	05/05/2021	1

- A. Contract Language
- B. Click the document to review/amend
- C. Click the **Check Out** button
- D. Go to next slide

GO BACK **CHECK OUT** C

How to negotiate & manage a contract

A. Open in Microsoft Word Online



How to negotiate & manage a contract

Word RFX_Goods and Services Contract - Saved to SMART by GEP

File Home Insert Layout References Review View Help

Editing (Make any changes)
Reviewing (Add comments and suggest changes)
Viewing (View the file, but make no changes)

GOODS AND SERVICES CONTRACT 2021.000149

This Contract # FORMTEXT (Effective Date) is made, and entered into, by and between Colorado Springs Utilities (Utilities), an enterprise of the City of Colorado Springs, a Colorado home rule city and municipal corporation, with its principal place of business at 121 South Tejon Street, 2nd Floor, Colorado Springs, Colorado 80903 and (Contractor), with its principal place of business at Contractor Address, a each individually a Party or collectively the Parties.

1. Definitions
The following terms shall have the meanings set forth below:
Project Manager – An employee that has been assigned by Utilities’ management that is responsible for the success of the project described in Exhibit A.
Goods - Supplies or any item purchased or available for purchase other than real property or services

File Name
RFX_Goods and Services Contract .docx

Location
Go Back

Save status
Saved to SMART by GEP

- A. Change your drop-down status of “Editing” to “Reviewing” – This will ensure that track changes is turned ON
- B. Now proceed to **edit the document**
- C. Once editing is complete click on the drop-down arrow by **Saved to SMART by GEP**
- D. Click on **Go Back**
- E. Click on **Check In**
- F. Notice that the **version** of the document changed
- G. Click on **Go Back**

GO BACK CHECK OUT

GO BACK OPEN IN MICROSOFT WORD ONLINE CHECK IN

RFX_GOODS AND SERVICES CONTRACT.DOCX

Contract Administrator : Rich Norton Jr. | Last Modified By : Rich Norton Jr. On 05/11/2021

Version 3.0

How to negotiate & manage a contract

Supplier Training Aug 3rd Supplier Review Pending COMMENTS TRACK STATUS DISCUSSION FORUM More

CONTRACT DETAILS ADDITIONAL INFORMATION CONTRACT LANGUAGE Export

Documents
Contract Language : 1
Attachments : 0

Commercial Terms
Contract Expiring In : 1826 Day(s)

BASIC DETAILS

Contract Name*	Supplier Training Aug 3rd	Contract Number*	2021.000092	Document Type*	Goods & Services Contract	Contract Type*	Master Agreement	Contract Administrator	Rich Norton Jr.
Description	Supplier Training Aug 3rd								

> APPLICABLE FOR

> INTERNAL PARTY

> EXTERNAL PARTY

> TERMS

> NOTES AND ATTACHMENTS

> NOTIFICATIONS

PREVIEW CANCEL REJECT ACCEPT

A

A. Supplier will proceed to click on Accept under the Contract Details page. This will submit your edited document(s) back to Utilities

How to negotiate & manage a contract

Contract

Contract Value	2,000,000.00 USD
Payment Term	NET 30

Basic Details

Contract Name 123 Company-000189-May2021	Contract Number 2021.000154	Contract Type Master Agreement
Define Consumption Not Applicable	Document Type Goods & Services Contract	Contract Administrator Rich Norton Jr.

Contract Description

5 year agreement with 2 5 year renewals for the purchase of Phase 1 and Phase 3 transformers across the Enterprise

Applicable For

Category CONSTRUCTION & ENGINEERING,TRAN...	Organization Entity Electric Distribution Operations - EDO	Region COLORADO SPRINGS
--	---	----------------------------

GO BACK

SEND FOR SUPPLIER SIGNATURE

A

Signature method

Please select signature method

Online mode Offline mode Let the signatory decide

B

C

SEND

CANCEL

CONFIRMATION

Are you sure you want to send this contract for supplier signature?

NO YES

D

- Once the document(s) are in a final version, Sourcing Owner will then proceed to click on **Send For Supplier Signature**
- Check the circle **Online Mode**
- Click on **Send**
- Click on **Yes** to confirm

How to negotiate & manage a contract

▼ BASIC DETAILS

Contract Name* 123 Company-000189-May2021	Contract Number* 2021.000154	Document Type* Goods & Services Contract	Contract Type* Master Agreement	Contract Administrator Rich Norton Jr.
--	---------------------------------	---	------------------------------------	---

Description
5 year agreement with 2.5 year renewals for the purchase of Phase 1 and Phase 3 transformers across the Enterprise

> APPLICABLE FOR

> INTERNAL PARTY

> EXTERNAL PARTY

> TERMS

> NOTES AND ATTACHMENTS

> NOTIFICATIONS

CANCEL REJECT SIGN CONTRACT

- A. Supplier will proceed to click on **Sign Contract**
- B. Supplier will be required to enter their **Signatory Password**
- C. Click on **Sign**
- D. Click on **Yes** to confirm

Sign Contract

Signatory Password*
.....

Place*
Colorado Springs

Title*
Account Mgr

Date
05/12/2021

I have authority to enter into this contract on behalf of my organization. I have read this contract in its entirety.

[Forgot Password/Set Password? Click here.](#)

PREVIEW CANCEL SIGN

CONFIRMATION


Are you sure you want to go ahead with the signature process?


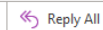


NO YES

Responding to a sourcing event

Responding to a sourcing event

GEP SMART: Invitation to Participate in Event 000169-May2021

 smartuat@gep.com
To: Rich Norton Jr.
Retention Policy 3 Year delete (3 years)

 Reply  Reply All  Forward 

Wed 5/5/2021 4:06 PM

Expires 5/4/2024

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

Hi Jim Smith,

You have been invited to participate in a sourcing event.


Here are the details:

Client Name: ColoradoSpringsUtilities

Event Name:000169-May2021

Event start date/time: 5/5/2021 04:00:00 PM Mountain Standard Time

Event end date/time: 5/6/2021 04:00:00 PM Mountain Standard Time

You can use the following link to access the sourcing event:<https://smartuat.gep.com/Sourcing/rfx?dd=ZGM9MTE0NCZicGM9NzAwMjE5NDI1&b=0&oloc=219&c=NzAwMjE5NDI1#/rfx/new> 

Basic Instruction:

1. If you do not have a GEP SMART account, click [here](#) to create a new account and register yourself with ColoradoSpringsUtilities.
2. After you create the password, you can log into GEP SMART and select the event to participate.
3. Note that the time zone of the event is Mountain Standard Time. You may be in a different time zone, and therefore, make sure you log on at the right time to avoid missing the event.

Thank you,
Sourcing Team

Our GEP Customer Support Team is happy to help. Reach out to us at <https://success.gep.com/>.

- A. When the Rfx is published the invited suppliers and team members will receive an **email**
- B. Supplier(s) will be required to click on the link within the email and respond to the Rfx

Rfx = Request for Quote; Request for Information; Request for Proposal

Responding to a sourcing event

- A. When the Supplier logs into GEP SMART, they will see an Action Pending
- B. Proceed to click on the Event Name

Colorado Springs Utilities
Catalog Sourcing Contract Purchasing Invoice Supplier

Search

Home
My Tasks
Create
Supplier Profile

ACTION PENDING FOLLOW UP

RFX 1

Event Name	Event Number	Event Type	Author	Created On
000096-Jul2021 (TEST)	000096-Jul2021	RFP	Rich Norton Jr.	7/9/2021

Rows Per Page: 10 1 - 1 Of 1

Responding to a sourcing event

- A. First step when the Supplier accesses the event is to review the General Guidelines. To view Guidelines, click on the document name
- B. If Supplier accepts proceed to click on the box
- C. The “Response closing in” shows how much time the Supplier has to submit their response

Note: The various sections of the Event will be reflected on the left-hand side of the page

The screenshot shows a web interface for a sourcing event titled "Supplier Training Aug 3rd" with a "New" badge. In the top right corner, a circular callout "C" points to a timer indicating "Response opening in 0d 0h 3m 18s" and a "Discussion Forum" button. On the left, a vertical navigation menu includes "GUIDELINES PENDING A...", "BASIC DETAILS", "EVENT TIMELINES", "BUYER CONTACT INFOR...", "TEAM MEMBERS", "GUIDELINES", "QUESTIONNAIRES", and "PRICE SHEETS". The main content area is divided into sections. The "GUIDELINES PENDING ACCEPTANCE" section contains an information icon and the text "Accept the guidelines listed in this section in order to participate in the event." with a "Download all Guidelines" link. Below this are two yellow-highlighted rows, each with a checkbox and the text "I Accept General Guidelines -Request for Proposal (RFP)" and "I Accept General Guidelines -Non-Disclosure Agreement Mutual". Callout "B" points to the first checkbox, and callout "A" points to the text of the first row. The "BASIC DETAILS" section below shows a text box for "Event Name" containing "Supplier Training Aug 3rd".

Responding to a sourcing event

Supplier Training Aug 3rd New

- GUIDELINES PENDING A...
- BASIC DETAILS
- EVENT TIMELINES
- BUYER CONTACT INFOR...
- TEAM MEMBERS
- GUIDELINES
- QUESTIONNAIRES
- PRICE SHEETS

GUIDELINES PENDING ACCEPTANCE

Accept the guidelines listed in this section in order to participate in the event.

- I Accept General Guidelines -Request for Proposal (RFP)
- I Accept General Guidelines -Non-Disclosure Agreement Mutual

BASIC DETAILS

Event Name
Supplier Training Aug 3rd

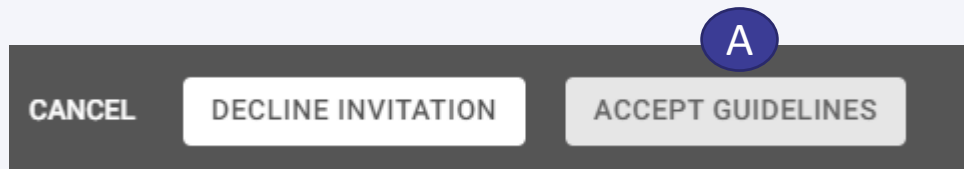
A

- A. Once you click on the I Accept General Guidelines
- B. Proceed to click on Accept Guidelines
- C. Click on Decline Invitation if you are choosing to not participate in this event – Do not check the boxes

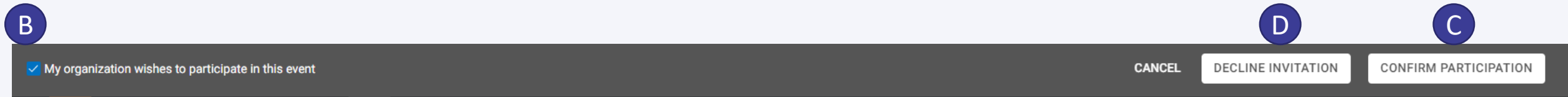
C **B**

CANCEL DECLINE INVITATION ACCEPT GUIDELINES

Responding to a sourcing event



- A. After you click on Accept Guidelines
- B. Proceed to check the box “My organization wishes to participate in this event”
- C. Then click on “Confirm Participation” or
- D. Click on “Decline Invitation” (Do Not check the box)



Responding to a sourcing event

✓ BASIC DETAILS **A**

Event Name **B**
000096-Jul2021 (TEST)

Event Description **C**
Test

Event Type **D**
Request for Proposal

Event Currency **E**
USD

Event Overview **F**
-

Category* **G**
TRANSFORMERS

Business Unit* **H**
Energy Construct Ops & Maint -

Region* **I**
COLORADO SPRINGS

- A. The Basic Details section reflects
- B. Event Name
- C. Event Description
- D. Event Type (i.e., RFI, RFP, RFQ, IFB)
- E. Event Currency – Will default to USD
- F. Event Overview will not be used at this time
- G. Category – Relates to the category the Goods and/or Services this RFP aligned to
- H. Business Unit – Identifies the Utilities Business Units impacted by this RFP
- I. Region – Will always default to Colorado Springs

Responding to a sourcing event

- A. The Event Timelines section reflects
- B. Time Zone
- C. The Start Date & Time of the Supplier response time
- D. The End Date & Time of the Supplier response time
- E. Duration for how long the Supplier has to submit their response

EVENT TIMELINES [Gantt View](#)

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

Name	Start Date & Time	End Date & Time	Duration
Response Timeline	07/09/2021 9:25 AM	07/09/2021 10:30 AM	1h 5m


Responding to a sourcing event

- A. The Buyer Contact Information section reflects
- B. Name of the Sourcing Owner at Utilities
- C. Designation (Their Role)
- D. Email Address
- E. Contact Number

BUYER CONTACT INFORMATION (1) A			
Name B	Designation C	Email Address D	Contact Number E
Rich Norton Jr.	Procurement Manager	rnorton@csu.org	719-985-1651

Responding to a sourcing event



- A. The Team Members section reflects
- B. Supplier team members that will be responding to this RFP
- C. Viewer can NOT respond to the various sections of the event
- D. Collaborator can respond to the various sections of the event

TEAM MEMBERS A				Manage Contacts
Name	C Viewer	D Collaborator	Invitation Status	
 Jim Smith B	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Invited On 07/09/2021 9:36 AM	

Responding to a sourcing event

A. If needed the Supplier can add Team Members by clicking on Manage Contacts

A

TEAM MEMBERS				 Manage Contacts
Name	Viewer	Collaborator	Invitation Status	
 Jim Smith	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Invited On 07/09/2021 9:36 AM	

Responding to a sourcing event

- A. Under the Guidelines section, these are the Guidelines that the Supplier accepted at the very beginning of the event
- B. To view Guidelines, proceed to click on the Guideline document name

A

✓ GUIDELINES (2)

<input type="checkbox"/>	Guideline Name	Guideline Type	Accepted By	Accepted On
<input type="checkbox"/>	B Non-Disclosure Agreement Mutual	General Guidelines	Jim Smith	08/02/2021 11:35 AM
<input type="checkbox"/>	Request for Proposal (RFP)	General Guidelines	Jim Smith	08/02/2021 11:35 AM

Responding to a sourcing event

- A. Under the Contract Terms section, the contractual documents as it relates to this sourcing event will be displayed.
 - B. The Supplier can view each document by clicking on the document name
- Note: If the Supplier does not have any changes to the documents they can proceed to move onto the next section

▼ CONTRACT TERMS

A

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

Name	Author	Modified By	Modified On	Status	Version
Furnish & Install Agreement	Rich Norton Jr.	Rich Norton Jr.	07/09/2021 9:36 AM	Check in	1

B

Responding to a sourcing event

A. If the Supplier has changes to the document, they will proceed to open the document and Check Out the document for editing as described from slides 35 - 38

CONTRACT TERMS 🔍

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

Name	Author	Modified By	Modified On	Status	Version
Furnish & Install Agreement A	Rich Norton Jr.	Rich Norton Jr.	07/09/2021 9:36 AM	Check in	1

Responding to a sourcing event

- A. Under the Questionnaires section the Supplier will proceed to open each document and respond to all questions
- B. To open the document, click on the document name – when the document opens you will be responsible to complete all the questions
- C. As reflected in the Questionnaire section the Supplier will see the Evaluation Type
- D. Last Modified by
- E. Last Modified On (Date)
- F. # of Questions that the Supplier needs to respond to
- G. Response Completion % - You want this % to be 100% - If not 100% the Supplier will not be able to submit their response

QUESTIONNAIRES (1)							Upload All	Download All
Questionnaire Name	Evaluation Type	Last Modified by	Last Modified On	Questions	Response Completion %	Actions		
RFP Questions (Training Draft)	Technical	-	-	4	<div style="width: 0%;"></div>		0.00%	

Responding to a sourcing event

A. When you have completed all your responses and returned to the main page the Questionnaire section will appear as shown below

QUESTIONNAIRES (1)


A

 Upload All  Download All

Questionnaire Name	Evaluation Type	Last Modified by	Last Modified On	Questions	Response Completion %	Actions
RFP Questions (Training Draft)	Technical	Jim Smith	07/09/2021 10:35 AM	4	<div style="width: 100%; height: 10px; background-color: green;"></div>	100.00% 

Responding to a sourcing event

- A. Under the Price Sheet section, the Supplier will be responsible to submit their quote via the Price Sheet(s). As reflected in the Price Sheets section the Supplier will see the
- B. Price Sheet Name
- C. Last Modified by
- D. Last Modified On (Date)
- E. Response Completion % - You want this % to be 100% - If not 100% the Supplier will not be able to submit their response


PRICE SHEETS (1) A					More
Price Sheet Name B	Last Modified By C	Last Modified On E	Response Completion % F	Actions	
Pad Mount Transformer RFP	-	-	<div style="width: 0%;"></div>	0.00% 	

Responding to a sourcing event

A. To submit the quote, proceed to click on the Price Sheet Name

PRICE SHEETS (1)

More

Price Sheet Name	Last Modified By	Last Modified On	Response Completion %	Actions
Pad Mount Transformer RFP A	-	-	<div style="width: 0%;"></div>	0.00% 

Responding to a sourcing event

← RESPOND - PAD MOUNT TRANSFO... ▾

Price Sheet Name: Pad Mount Transformer RFP

Price Sheet Type: Materials **B**

Price Sheet Description: -

Displaying 2 of total 2 rows

	C	D	E	F	G	A	H
1	*Intent to Bid	*Item Name	*Item Number	*Volume	*Unit	*Price Per Unit...	Total Price (USD)
2	Yes	25KVA PM	123	1,000	EA : Each	USD 800.00	USD 800,000.00
3	Yes	50KVA PM	456	1,500	EA : Each	USD 1,300.00	USD 1,950,00...
4							USD 2,750,00...

Unfreeze Column Details Show/Hide Columns

I


CANCEL DONE

- A. On this next page, the Supplier will proceed to enter their Price Per Unit for each line item
- B. As it relates to Price Sheet Type "Materials" the Supplier will see the following fields
- C. Intent to Bid – Supplier has to say Yes or No for each item
- D. Item Name
- E. Item Number – also referred to as Part Number
- F. Volume
- G. Unit of Measure
- H. Total Price = Volume * Price Per Unit
- I. Once Supplier has completed the Price Sheet, Click Done

Responding to a sourcing event

A. When you have completed the Price Sheet and returned to the main page the Price Sheets section will appear as shown below

PRICE SHEETS (1) A More

Price Sheet Name	Last Modified By	Last Modified On	Response Completion %	Actions
Pad Mount Transformer RFP	Jim Smith	07/09/2021 10:42 AM	<div style="width: 100%; height: 10px; background-color: green;"></div> 100.00%	

Responding to a sourcing event

- A. Under the Attachment section, this is where the Supplier will be able to access documents (i.e. Drawings, Statement of Work, Material Specifications) for their review as they are responding to the various RFX sections

ATTACHMENTS

A

No Attachments available!

Responding to a sourcing event

- A. If a Supplier wishes to communicate with the Utilities Sourcing Owner, they can do so by using the Discussion Forum – this is a great way to manage and track your discussion with the Utilities team. To send a post click on the Discussion Forum button

The screenshot shows the top navigation bar of the Colorado Springs Utilities Sourcing Event portal. The navigation menu includes 'Catalog', 'Sourcing', 'Contract', 'Purchasing', 'Invoice', and 'Supplier'. A search bar is located on the right side of the navigation bar. Below the navigation bar, the main content area displays the event ID '000096-Jul2021 (TEST)' and a 'Participation Confirmed' status. A 'Discussion Forum' button is visible in the top right corner of the main content area. A circular profile icon with the letter 'A' is also present in the bottom right corner of the main content area.

Responding to a sourcing event

The screenshot shows a web interface for a discussion forum. At the top left, there is a circular icon with the letter 'C'. Below it, the page title is 'DISCUSSION FORUM - 000096-JUL2021 (TEST)'. On the right side of the header, there are links for 'Refresh', 'Download', and 'Create'. The main content area is titled '000096-Jul2021 (Default)' and 'SUPPLIER MEMBERS Jim Smith'. A message from 'Rich Norton Jr.' is visible, dated 7/9/2021 09:16 AM. Below the message is a large text input field. A blue circular icon with the letter 'D' is positioned above the input field. At the bottom of the input field, there is a rich text editor toolbar with options for bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, and outdent. Below the toolbar, the text 'Hi Rich,' is followed by 'I have completed submitting my response to your RFP. Have a great day!!'. A blue circular icon with the letter 'A' is positioned to the right of this text. At the bottom right of the input area, there is a 'POST' button. A blue circular icon with the letter 'B' is positioned to the right of the 'POST' button. A blue circular icon with the letter 'C' is positioned at the top left of the page.

- A. Start by drafting your communication in the open text field
- B. Click Post when completed with drafting your communication
- C. To return to the main page of the event click on the back arrow or close the window
- D. For formatting of your message

Responding to a sourcing event

000096-Jul2021 (TEST) Participation Confirmed

Response closing in 0d 0h 3m 43s [Discussion Forum](#)

BASIC DETAILS

Event Name: 000096-Jul2021 (TEST)

Event Description: Test

Event Type: Request for Proposal | Event Currency: USD | Event Overview: -

Category*: TRANSFORMERS | Business Unit*: Energy Construct Ops & Maint - ... | Region*: COLORADO SPRINGS

EVENT TIMELINES [Gantt View](#)

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

Name	Start Date & Time	End Date & Time	Duration
Response Timeline	07/09/2021 9:25 AM	07/09/2021 11:00 AM	1h 35m

BUYER CONTACT INFORMATION (1)

Name	Designation	Email Address	Contact Number
Rich Norton Jr.		rnorton@csu.org	

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

Validate CANCEL SUBMIT RESPONSE

A. To submit your response, click on the Submit Response button

Responding to a sourcing event

CONFIRMATION

Are you sure you want to submit your responses?

NO


YES

- A. The following message will pop up, click on YES
- B. When you click on YES, the following will pop up, click on OK

SUCCESS!

Responses were submitted


OK

Responding to a sourcing event

000096-Jul2021 (TEST) Response Submitted B Response closing in 0d 0h 1m 46s Discussion Forum

BASIC DETAILS

Event Name
000096-Jul2021 (TEST)

Event Description
Test

Event Type
Request for Proposal

Event Currency
USD

Event Overview

Category*
TRANSFORMERS

Business Unit*
Energy Construct Ops & Maint - ...

Region*
COLORADO SPRINGS

EVENT TIMELINES Gantt View

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

Name	Start Date & Time	End Date & Time	Duration
Response Timeline	07/09/2021 9:25 AM	07/09/2021 11:00 AM	1h 35m

BUYER CONTACT INFORMATION (1)

Name	Designation	Email Address	Contact Number
Rich Norton Jr.		rnorton@csu.org	

TEAM MEMBERS Manage Contacts

CANCEL WITHDRAW RESPONSES A

- A. If you have a need to make further edits to your response you can do so by clicking on the Withdraw Responses button
- B. This can only be done if the Response Closing In is still open

Thank You

Thank You for attending today's session. If you have any questions, please do not hesitate to reach out to us. You can contact with us via the following email: procurement@csu.org or feel free to reach out to Rich Norton – rnorton@csu.org