

ONESolution™

BID & QUOTE MANAGEMENT AGENDA

Course Outline

Recommended Training Format: Live Virtual Classroom

Estimated Hours: 2 hours Client Interaction; .67 hours Consultant preparation and follow-up

Prerequisites:

1. Access to ONESolution
2. Prior Knowledge of ONESolution (previously known as IFAS)

Audience: Key ONESolution Users, IT Support

Objective: During this training, you will learn how to navigate in the ONESolution Bid and Quote Management module and learn the basic overview of the module. This knowledge should be applied for Testing, End User Training and GO LIVE scenarios.

What You Will Learn:

- Overview
 - Integration Picture
 - System Process
 - System Features/Functions Demonstration
- Process
 - Integration Picture
 - Define Formal Bid
 - Create a TBD Purchase Requisition
 - Reference Bid Number on TBD Purchase Requisition
 - Create list of Bidders
 - Create a CDD cover letter to pull in the list of eligible bidders
 - Enter Vendor Responses
 - Award Responses
 - Change status on Bid to AW
 - Run Utility to Create Purchase Orders
- Maintenance
 - General Information Screen
 - BM Codes
 - BQ Tracking

CDD Reports

- Look at corresponding Bid & Quote Management CDD reports

Homework: Document Process