SERVICES

Request for Proposal (RFP) Tutorial

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Introduction

- This briefing will introduce the Request for Proposal (RFP) process
- Requests for Proposals (RFPs) must be created by a Contracting Officer or Contract Specialist using the CHESS IT e-mart https://chess.army.mil
- You will learn:
  - CHESS IT e-mart Registration
  - How a Contracting Officer or Contract Specialist creates and submits an RFP
  - How to create a draft RFP
  - How a Contracting Officer or Contract Specialist manages an RFP
    - Sharing an RFP
    - Amending an RFP
    - Canceling an RFP
    - Transferring an RFP
  - How a Vendor views and responds to an RFP response
  - How a Contracting Officer or Contract Specialist can view RFP submissions
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Please NOTE:

- The RFP process runs best in Firefox, Internet Explorer 9 or 10 and Google Chrome.

Not Recommended
The RFP Process
Step 1 - Register

- If you do not have an account with the CHESS IT e-mart you must first register in order to gain access to the RFP Manager.

Click “Register” at the top left section of the CHESS IT e-mart
Step 2 – Create an Account

Fill out the form using a mail.mil account for your email address and select “Register”.

NOTE: CHESS IT e-mart users should ensure their password is unique to CHESS and you do not use passwords from other systems (e.g., network, banking, email, etc.)
Step 3 – Login to the CHESS IT e-mart

You will need to login to access the RFP process.

After logging in you will be returned to the home page – click on the RFP links again.
Step 4 - Access the RFP Manager

Hover over “RFx” on the Main Menu then click “Request for Proposal” or click “Request for Proposal: RFP” under Services
Step 5 - Create an RFP

To create an RFP from any RFx page, hover over the “RFP - Services” button and select “Create”.

![Request For Proposal](image_url)
Step 6 - Select Type of Request

Select either ITES-2S or ITS-SB from the drop down menu.

Note: You must select either one or all.
Step 7 - Select Vendors

Select all vendors unless the requirement meets one of the exceptions as defined in FAR 16.505 (b) or DFARS 216.505-70.
Step 8 - Enter Requirement

(1) Name the RFP

(2) Select your Agency & Activity

(3) Enter information about the RFP. Please be sure to provide proposal delivery instructions (e.g. email, hardcopy) in your RFP posting.
Step 9 - Add Attachments

Notice: Please ensure uploaded attachments DO NOT contain vendor proprietary information (competitor pricing, discounts, etc.). This is unfair competition. Instances of this will be reported to the CHESS Product Leader (PL).

You may attach up to 5 files of 5MB each. (The system accommodates Word, Excel, PDF, TIF, and WinZip files)

NOTE: Please DO NOT add an attachment with other vendor pricing!
Step 10 - Dates

To alter the “Customer Required By Date” date click on the date. Dates cannot equal current date.

Date Time Frames
- Acknowledge Expected Date: 2 Days
- Response Expected Date: 3 Days
- Due Date: 10 Days
(Time frame is in business days and does not include holidays)

NOTE: The “Customer Required By Date” can be altered but we ask you follow the time frame when applicable.
Step 11 - POC, Questions, Submit RFP

Submit contact information about end user. This information is maintained by CHESS, but not shared with vendors.

Answer basic Contracting questions regarding this requirement.

Click to submit RFP
Once your RFP is submitted your screen will look like this. A bar at the top of the page will indicate that your RFP has been created.

NOTE: Your screen will automatically update every 90 days and auto archive outdated RFP’s
View of successfully submitted RFP

Click the triangle next to the RFP line item you would like to expand for a detailed view.
The RFP Process After Submission

- The Contracting Officer or Contract Specialist and vendor will receive an RFP notification via email from the CHESS IT e-mart.
- The vendor responds to the RFP.
- The Contracting Officer or Contract Specialist receives email notification that RFP responses have been posted to their RFP Manager.
- The Contracting Officer or Contract Specialist logs back into the RFP Manager to view responses.
Once your RFP is submitted you will receive an email from CHESS like the one below.

You have just successfully submitted a new Request for Proposal (RFP) through the CHESS IT e-mart. Details of your request are below:

Title: RFP TEST #1  
Program: ITES-2S  
Reference Number: 141971  
Description: This is an RFP test  
Date Created: 1/8/2016  
Customer Required By Date: 1/22/2016  

You may also view the details of your Request by logging into your Request Manager.

Please check your Request Manager regularly to see if you have received any responses from the vendors.

Thank you for using the CHESS IT e-mart system!

Please feel free to contact CHESS at: (888) 232-4405 if you have any questions.

"PLEASE NOTE THIS IS PROPRIETARY INFORMATION AND SHOULD NOT BE SHARED WITH OTHER VENDORS."
Email to Vendor(s)

Each vendor receives an email, which looks similar to this one, alerting them of your RFP.

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Classification: UNCLASSIFIED
Caveats: NONE

The CHESS IT e-mart has brought you a potential customer! By accessing the RFP below, you are acknowledging the receipt of the RFP.

Please coordinate with the customer concerning their pending RFP by logging into the RFP Manager.

Keep in mind that CHESS customers are awaiting your response, and your timeliness in addressing their RFPs is greatly appreciated.

Thank you for using the CHESS IT e-mart system!

Please feel free to contact CHESS at: (888) 232-4405 if you have any questions.

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Classification: UNCLASSIFIED
Caveats: NONE
Creating a Draft RFP
Step 1 - Save as Draft

If you are working an RFP and are not quite ready to submit click the “Save As Draft” button.

Note: You must select either one or all.
Step 2 - View RFP Drafts

You will automatically be defaulted to the RFQ Index page. Hover over the “RFP-Services” button and select “Draft” for a list of your Draft Requests.
Step 2 - View RFP Drafts continued

On this page all the Drafts RFP’s you are currently working on will be listed.
## Step 3 - Edit Draft

Select “Edit Draft” whenever you need to make changes to your RFP.
Step 4 - Make Changes & Submit

Make any necessary changes to your RFP scroll down and click “Finalize/Submit.” You also have the option to “Delete the Draft” as well.
View of successfully submitted RFP

Once your RFP is submitted your screen will look like this. A bar at the top of the page will indicate that your RFP has been submitted.
Sharing an RFP
How to Share an RFP

If you have someone on your team that you wish to share your RFP information with you can click the “Share” button on the RFP line item. This will allow the person read only access.

Start typing the last name of the person you wish to share with and a list will populate to choose from, then click Submit.

Click the “Share” button to provide read only access to anyone in our CHESS IT e-mart database.
How to Share an RFP

Once you have entered the name of the person you wish to share your RFP with, a confirmation screen will appear. Click OK to continue.
Amending an RFP
Amending an RFP

The **Amendment** feature allows you to:

- Update an RFP at any time in the process
- Clarify the details of a requirement
- Notify vendors of updates or new deadlines
Amending an RFP

Ensure you are on the “RFP - Services” Index page then click the “Amend” link to the right of your RFP.
Amending an RFP

Update information in the Description field as required.
Amending an RFP

This allows you to attach new files.

*NOTE: Your original files are still attached. Only add additional attachments if those files need to be updated or a new file is to be submitted.

You may attach up to 5 files of 5MB each. (The system accommodates Word, Excel, PDF, TIF, and WinZip files)
Amending an RFP

Once your RFP is amended your screen will look like this.

NOTE: The Status column will not change for the RFP you recently amended.
Cancelling an RFP
Cancelling an RFP

The **Cancel** feature allows you to:

- Cancel an RFP at any time in the process
- Notify vendors of updates and the cancellation of an RFP
- The Contracting Officers or Contract Specialists may both cancel RFPs
Cancelling an RFP

Ensure you are on the “RFP - Services” Index page then click the “Cancel” link to the right of your RFP.
Cancelling an RFP

Choose a Cancel Reason from the drop down Menu, enter any comments, then click “Submit”.

NOTE: Once you select “Yes” you will not be able to edit your RFP. It will be cancelled.
Cancelling an RFP

A bar at the top of your screen will appear confirming the cancellation.

NOTE: Once the RFP is cancelled you will have to submit a new RFP if you have a new requirement.

Once your RFP is cancelled the Status column will change to “Cancelled”.

NOTE: Once the RFP is cancelled you will have to submit a new RFP if you have a new requirement.
Transferring an RFP
The **Transfer** feature allows you to:

- Transfer an RFP at any time in the process to another user
- User is able to transfer multiple RFP’s at once to another user
- The person who submitted or anyone with administrative authority may transfer/reassign the RFP
How a Contracting Officer or Contract Specialist Transfers an RFP

Ensure you are on the “RFP - Services” Index Page then click the checkbox under the Transfer column found to the right of your RFP and then click “Transfer.”

NOTE: If you click on multiple checkboxes you will be able to transfer multiple RFP’s to one person.
How a Contracting Officer or Contract Specialist Transfers an RFP

Once you start typing this field will auto populate with a list of users pertinent to your search.

Submit contact information about end user. This information is maintained by CHESS, but not shared with vendors.

Then click “Submit” to Transfer the RFP.
How a Contracting Officer or Contract Specialist Transfers an RFP

NOTE: The RFP that was transferred will no longer appear in your list of RFP’s.

Once you hit save to transfer your RFP a confirmation screen will appear. Click OK to continue. Once you refresh your screen your RFP will no longer appear.

NOTE: The RFP that was transferred will no longer appear in your list of RFP’s.
Vendor View of RFP Submissions
Vendor View of RFP Response

Once Vendors login, they will see a screen that looks like this.

In order to respond to a particular RFP, the Vendor must click the "Respond" link to the right of the RFP.
Vendor Responds to an RFP

A Vendor uses an online form to submit a response, (bid or “no bid”), but will submit proposal documents to the Contracting Officer or Contract Specialist via the Attachments tool.

You may attach up to 5 files of 5MB each. (The system accommodates Word, Excel, PDF, TIF, and WinZip files)

Vendor clicks “Submit” to respond to RFP
Vendor Responds to an RFP

Once a response is submitted the bar at the top of the page will indicate the response as shown and the RFP will be moved to the “Responded” page.
Vendor Views Responded RFPs

Once a response is submitted the Status will change to “Responded.”

A Vendor needs to ensure they are on the “Responded” page by hovering over “RFP - Services” and clicking “Responded” in order to see a list of ALL responded requests.
Contracting Officer or Contract Specialist
View of RFP Submissions
A Contracting Officer or Contract Specialist Reviews Bids

Ensure you are on the “RFP - Services” Index page when reviewing responses. Expand the RFP you want to review by clicking the triangles to the left and filter down to see responses.

0/16 indicates number of vendors that have responded. (Ex: Out of 16 Vendors 0 responded)
Questions

For information about using IT e-mart, contact the CHESS Customer Support Team at armychess@mail.mil or toll free at: (888) 232-4405