

# Tender Download/Upload to Spreadsheet

## The spreadsheet (bid230.xls) will handle the following functions:

- Accept download into the 'Import' tab starting at row1, column1
- Based on the new download to 'Import' - the 'Responsesheet' tab Needs to be copied for totals number of items so that Vendor can respond to each item on the bid
- Based on information held in the 'Responsesheet' tab, the 'Export' tab copied with the same formula for each item will format automatically in the pbid380u tab

The spreadsheet has no limits to number of items. After import you must modify the 'Export' and 'Responsesheet' tabs in order to accommodate the appropriate number of items. This would mean unprotecting the worksheets (password is CIMS) and handling the macro statements to accept additional lines.

In order to perform district changes to the spreadsheet make sure to UNPROTECT all the tabs. Use Tools Protection - Unprotect PASSWORD = cims

**\*\* When you receive the spreadsheet - the columns are labelled Desc1, Desc2, Desc3 .. MAKE SURE TO UPDATE THEM WITH APPROPRIATE TITLES THAT MATCH YOUR INV.310 !!!**

## Details of all Bid related Activities:

1. In CIMS, run BID.230 to prepare Vendor Proposal .. when the report is looking as it should - request to Build File. This will update a download file ready for us to import into the Vendor Spreadsheet.
2. Open the Spreadsheet Template bid230template.xls and immediately do a 'Save As' so that you never wreck the original template.
3. We are assuming that the template import is blank. If it is not make sure to clear ALL lines. Position your cursor at row1, column 1 on the Import tab (accept new bid) ... Use the CIMS bible to draw information from the AS/400 .. Create New ... File = FMSTRANS/PBID230(XXXXX00)

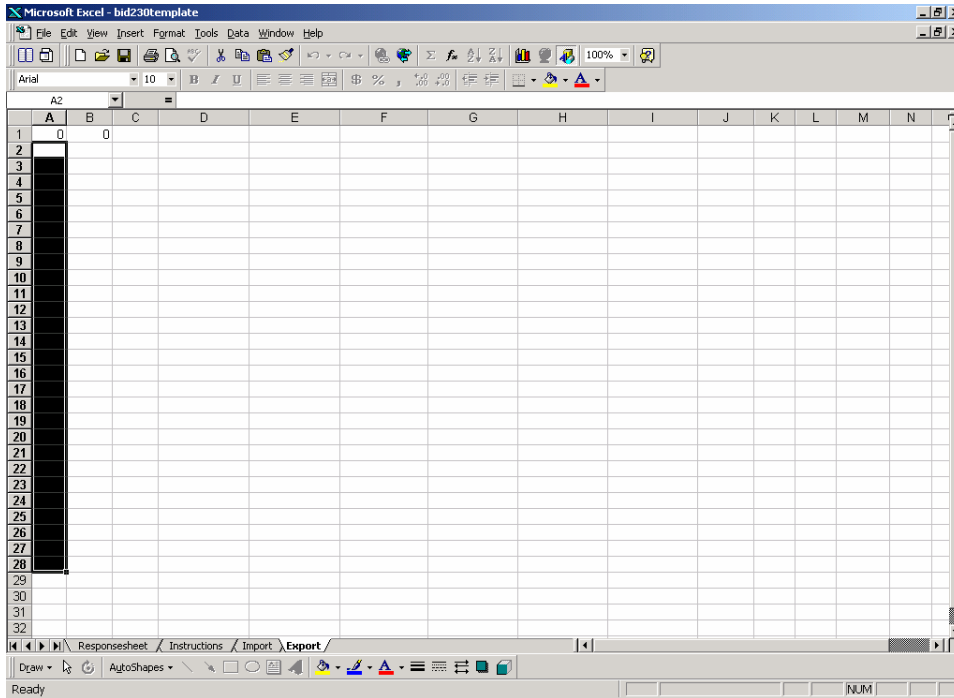
At this point, the spreadsheet will 'fill' with current bids as created in BID.230

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	VBCAT	VBCAT	VBKID	VBDES1	VBDES2	VBDES3	VBDES4	VBDES5	VBDES6	VBDQTY	VBCUM	VBSUB		
2	BATTERIEDRAIN	DONNATE	DONNAS							140	EA			
3	BATTERIEDRAIN	DONNA12	DONNA TE							500	EA			
4	BATTERIEULTRA LO TESTI1	TEST								750	EA			
5	BATTERIEULTRA LO TESTI2	TEST								10	EA			
6	BATTERIEULTRA LO TESTI3	TEST								600	EA			
7	BATTERIEULTRA LO44301	SIZE AA	DURACEL	Size	Color			104104		400	PKG	5	9	
8	LAMPS - \SHADES	044500	BAK							999999	EA			
9	LAMPS - \SHADES	MOV488	MICROSO							136	EA			
10	LAMPS - \SHADES	044501	7C/W	11						80	BOX			
11	LAMPS - \WINDOW	123456789	T-SHIRT							10000	EA			
12	COMPUTEACCESSOF	CMP0003	PAPER	0	20LB	ULTR	0	1/2	x 11	WHITE	WEYERH	PART#	12	
13	COMPUTEACCESSOF	CMP0006	MOUSE	SERIAL	Standard	Grey	IBM	Comp		50	EA			
14	COMPUTEACCESSOF	CMP0002	MOUSE	P	BLUE	5" by 5"	IDEA	BRAND X	V12124	600	EA		Y	
15	COMPUTEACCESSOF	CMP0005	MOUSE	TWO	BUT		IBM	COM	IBM	MOUS	50	EA		
16	COMPUTEACCESSOF	CMP0007	MOUSE	TWO	BUT		APPLE	CC		75	EA			
17	COMPUTEACCESSOF	MC340020	PAPER	CONTINU	9.5" x 11"	WEYERH				100	CAS			
18	COMPUTEACCESSOF	CMP0001	MOUSE	P	5 x 7"	GREY	XEROX	XC12231		22	EA		Y	
19														
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23														
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31														

\*\* If column headings appear in line 1 - DELETE THIS ROW !!!!

\*\* Pay attention to the number of lines that downloaded. You can tell this by the row#.

4. You must update the 'Export' tab to contain the same number of lines as the Import. Copy line# 1 to the total number of lines needed, ie: If there are 100 items then:
  - a) copy line #1
  - b) highlight from line 2 thru line 100
  - c) paste\*\* This should paste the formula all the way to line 100.



5. You must update the Responsesheet tab to contain same number of items (each item takes seven lines) as the import file. Copy line # 7 thru 13 as many times as there are items.
  - a) highlight lines 7,8,9,10,11,12,13 - copy
  - b) figure out how many times, what line number you need to copy to .. formula  
$$((\#items \times 7) - 7) + 13$$
  - c) highlight from row 14 thru formula line - paste. If the system provides an error you have not got the proper 7 lines per item - re-do your formula\*\* This should paste/fill the response sheet with all items. Make sure to check the last line to ensure you got them all!!!!

At this stage your Responsesheet is ready to send to Vendors. Make sure to:

- a) Protect all tabs - Tools, Protection, Protect
- b) Fill-in the Instruction Tab if you have any further notes for Vendors

Once the Response Sheets are returned, District can unprotect the tabs and start confirming information.

District MUST update Sheet with appropriate Vendor#. Unprotect the sheet (password =CIMS) to input the Vendor#. Also look to change the descriptions in red to match your field usage. REMEMBER TO PROTECT THE SHEET AGAIN!!!

Vendor instruction sheet should be included. If there are changes to item description or any alternate fields Vendor can input the changes, otherwise leave the desc fields blank to accept the current information shown on the left (in CIMS).

Vendor must input price and unit of measure field(s)

If there is an alternate price (say higher pricing second half of the year) Vendor can update as shown below (price and start/stop dates)

The Vendor Response worksheet tab should be protected on the left side - allowing the Vendor to update only those things on the right - yellow. This is CRITICAL to ensuring that additional rows don't get inserted or columns shifted over or columns hidden .....

As the Vendor inputs their bid - export tab is filling beautifully with the information in a format that will be uploadable.

6. Once the Vendor has returned the spreadsheet and you have given it the final checkover to ensure it is valid. AND, once you have the Vendor# inputted at the top of the sheet ... you are ready to upload the information to CIMS. OPTIONAL. There is an awarded column, and alternate item columns that you can edit before upload.
7. The vendor response file needs to be saved. Steps are important to follow EXACTLY:
  - Save the spreadsheet
  - Then do a 'File Save As' while on the export tab
  - Select the save file type to be comma separated (.csv)
  - Name the file pbid380u.csv

8. Next, the saved response file needs to be loaded to CIMS. This needs to be done one Vendor at a time, ie: each time you re-save from the spreadsheet you are overwriting the last load! Use Data Transfer to AS/400 (an .fdf must be in place) .....  
FROM c:\xxxxxxx\pbid380u.csv  
TO FMSTRANS/PBID380U(XXXXXX00)
9. Final Step: Load the information to live BID.380. Pay attention in BID.380 first. Are last years proposals still there and if so REMOVE THEM. You want to make sure that if you 'Index in BID.380 the information there is current. Use BID.375 and run Report Only 'Y' first to ensure/validate your file. Once the report appears in your OUTQ with no errors - use Report Only 'N' to process.