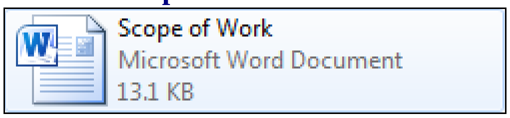
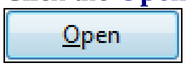
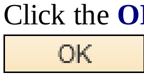
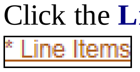
Creating a CSCR entry

Step	Action
1.	Begin by navigating to the **Create Solicitation** page. Click the **Main Menu** button. Main Menu
2.	Click the **FI$Cal CSCR** menu. FI$Cal CSCR
3.	Click the **Create Solicitation** menu. Create Solicitation
4.	The **Find an Existing Value** and **Add a New Value** tabs are usually shown together in FI$Cal. The **Find an Existing Value** tab is used to locate CSCR entries already created by your department. The **Add a New Value** tab is used to create a CSCR entry in FI$Cal. In this scenario, the **Add a New Value** tab will be used.
5.	The **Business Unit** is your department's unique identifier within FI$Cal. You can only modify the field you are assigned to multiple departments.
6.	CSCR entries in FI$Cal are referred to as events. Each CSCR entry is uniquely identified by its **Event ID**. The **Event ID** field is currently defaulted to the value NEXT. The field will update to the next available numeral in your business unit after you save the CSCR entry.
7.	As this is the creation of a CSCR entry, the event round and version begin as 1.
8.	The possible values for **Event Format** are: - Buy - RFI (Request for Information) - Sell In this scenario, we will be creating a "Buy" event.
9.	The only possible **Event Type** value is "RFx," meaning **R**equest **F**or x, where x can be a Bid, Proposal, or Quote). This Event Type will always be used when using FI$Cal to advertise your CSCR event.
10.	Click the **Add** button. Add

Step	Action
11.	The **Create an Event** page displays. This page collects all information required by FI$Cal CSCR to post your department's solicitation. This begins with the CSCR **Event Summary** section information. When creating a CSCR entry, you are required to complete the header information and invite bidders before you can save the entry.
12.	The **Event Name** is the title of your solicitation. Assign the event a logical name that will help you identify it in the future. Click in the **Event Name** field.
13.	Enter the desired information into the **Event Name** field. Enter a valid value e.g. "**Reupholster furniture**".
14.	The **Description** field can be used for an explanation of the CSCR entry. Click in the **Description** field.
15.	Enter the desired information into the **Description** field. Enter a valid value e.g. "**Reupholster training room office chairs**".
16.	Next, define the **Preview**, **Start** and **End** dates.
17.	The **Preview Date** is the date that you can make the event available to potential bidders, allowing them to review the event as well as draft and save their bids, which they can then post as soon as the event starts.
18.	The **Start Date** is the date when bidders can begin to post bids for the event.
19.	The **End Date** is the date when the bidding closes. **Note:** If an extension in time was necessary after the event has been posted, you would need to create a new event version and resubmit for approval.
20.	A date can be entered by typing manually, or by choosing a date from the calendar. Click the **Choose a date** button for the **Preview Date**. 
21.	Click the desired date e.g. "**1/26/2015**" 26
22.	Click in the **Time** field for the **Preview Date.** 4:13PM
23.	Press **[Backspace]**.
24.	Enter the desired information into the **Time** field. Enter a valid value e.g. "**8:00AM**".

Step	Action
25.	Click in the **Start Date** field. 01/20/2015
26.	Press **[Backspace]**.
27.	Enter the desired information into the **Start Date** field. Enter a valid value e.g. "**02/02/2015**".
28.	Click in the **Time** field for the **Start Date.** 4:13PM
29.	Press **[Backspace]**.
30.	Enter the desired information into the **Time** field. Enter a valid value e.g. "**8:00AM**".
31.	Click in the **End Date** field. 01/20/2015
32.	Press **[Backspace]**.
33.	Enter the desired information into the **End Date** field. Enter a valid value e.g. "**02/13/2015**".
34.	Click in the **Time** field for the **End Date**. 4:13PM
35.	Press **[Backspace]**.
36.	Enter the desired information into the **Time** field. Enter a valid value e.g. "**5:00PM**".
37.	Next, define the **Acquisition Type** being used for this CSCR solicitation. **Note:** The Encumbrance Only Acquisition Type is for transactions that are non-procurement purchases, such as rent, leases, or utilities and should not be used during the CSCR solicitation process.
38.	Click the **Look up Acquisition Type** button.
39.	Click the **NON-IT Services** link. NON-IT Services
40.	Depending on which Acquisition Type you choose, you may be required to select an **Acquisition Sub-Type** as well.
41.	Click the **Look up *Acquisition Sub -Type:** button.
42.	Click the **Personal Services** link. Personal Services

Step	Action
43.	Click the **Look up Acquisition Method** button.
44.	Click the **Formal Competitive** link. Formal Competitive
45.	The Department of General Services (DGS) has assigned your department a specific billing code. This code will be entered in the **DGS Billing Code** field.
46.	Click the **Look up DGS Billing Code** button.
47.	Click the **030006** link. 030006
48.	If applicable, enter the **IBond** information for this purchase order. **Note:** This field is not often populated. As defined in the State Contracting Manual (SCM), it is only applicable for state-managed bond programs. If entered, it is reported on a Standard 810.
49.	Use the **Two Envelope** checkbox to indicate if the solicitation will use the two-envelope process for viewing bids. Otherwise, leave this box unchecked.
50.	The CSCR header information is now complete.
51.	Events in FI$Cal are defaulted as "Sealed Events", meaning that when bid responses are submitted, the bids are "sealed" and all bid response information is hidden until after the **End Date** for the event. If you wished to change this setting, you could use the **Event Settings and Options** link to "unseal" the event bids.
52.	Use the **Event Comments and Attachments** page to provide any additional information for the bidders. Click the **Event Comments and Attachments** link. Event Comments and Attachments
53.	The **Event Header Comments and Attachments** page displays. This page can be used to upload any applicable documents to the CSCR entry, or add any desired comments. Comments can be sent to the Bidder and/or included on the award. The primary use of this page will be to attach your formal bid package for bidders to review.
54.	Click the **Add Attachment** button. Add Attachment
55.	Click the **Browse** button. Browse...

Step	Action
56.	Navigate to the document that will be attached to the CSCR entry. In this example, we will attach a scope of work for the event.
57.	Click the **Scope of Work** list item. 
58.	Click the **Open** button. 
59.	Click the **Upload** button. 
60.	Depending on the size of the attachment, uploading will take several seconds, as shown by the spinning symbol.
61.	Once the upload is complete, the file will display in the **Attachments** section of the page.
62.	An **Attachment Description** can then be added, if desired.
63.	Click in the **Attachment Description** field. 
64.	Enter the desired information into the **Attachment Description** field. Enter "**Work to be completed**".
65.	Use the **Display to Bidder** checkbox to indicate if the attachment should be accessible to bidders. Otherwise, leave this box unchecked.
66.	Click the **Display to Bidder** option. 
67.	Use the **Include on Award** checkbox to indicate if the attachment should be accessible when the event is awarded. Otherwise, leave this box unchecked.
68.	Use the **Include in Notifications** checkbox to indicate if the attachment should be accessible in event notifications. By default, this box is checked.
69.	Lastly, use the **View** button to view the document that you have just uploaded.
70.	When finished uploading comments and attachments, use the **OK** button to return to the main page of the CSCR entry.
71.	Click the **OK** button. 
72.	Now that the header information and attachment are complete, a line item will need to be entered and bidders can be invited view and bid on the event.
73.	Click the **Vertical Scrollbar**.
74.	Click the **Line Items** link. 

Step	Action
75.	The **Line Items** page displays. This page is used to create line item entries for the event. Use the **Line Items** section to define the item(s) that will be included with this event.
76.	Click in the **Description** field.
77.	Enter the desired information into the **Description** field. Enter "**Reupholster furniture**".
78.	Click the **Look up Category** button.
79.	Click the **Description** list. begins with
80.	Click the **contains** list item. contains
81.	Click in the **Description** field.
82.	Enter the desired information into the **Description** field. Enter "**furniture**".
83.	Click the **Look Up** button. Look Up
84.	Click the **Vertical Scrollbar**.
85.	Click the **Office furniture lease and maintenance service** link. Office furniture lease and maintenance service
86.	Click in the **UOM** field.
87.	Enter the desired information into the **UOM** field. Enter "**ea**".
88.	Click the **EA** object. EA
89.	Click in the **Qty** field.
90.	Enter the desired information into the **Qty** field. Enter "**20**".
91.	Click in the **Start Price** field.
92.	Enter the desired information into the **Start Price** field. Enter "**1**".
93.	Click the **< Return to Event Overview** link. < Return to Event Overview
94.	Click the **Bidder Invitations** link. * Bidder Invitations

Step	Action
95.	The **Invite Bidders** page displays. This page can be used to invite specific bidders to view a solicitation, make a solicitation public, or to create a combination of invitations. For this scenario, the solicitation will be open to the public.
96.	Use the **Public Event** checkbox to indicate if the solicitation will be accessible to the public. Otherwise, leave this box unchecked. In this scenario, the solicitation will be public. Click the **Public Event** option. Public Event
97.	A new bidder, **Public_Auc**, now displays as being invited to the solicitation. This is to signify that when the event is posted, anyone that logs onto Cal eProcure will be able to search for and view this event.
98.	Use the **Post to CSCR** checkbox to indicate if the solicitation will be posted on FI$Cal CSCR. If selecting the **Public Event** option, the **Post to CSCR** option also needs to be checked. In this scenario, the solicitation will be posted to CSCR, because you are creating a Public Event. Click the **Post To CSCR** option. Post To CSCR
99.	These changes to the event must be saved. Click the **Save Event Changes** button. Save Event Changes
100.	Notice that after saving, the **Event ID** is updated to an individual number.
101.	If you wish to invite specific bidders or suppliers individually, you can use the **Search for Bidders** link to help identify those which to invite. Specifically invited bidders/suppliers will receive individual email notifications noting that the event has been posted.
102.	Click the **Search for Bidders** link. Search for Bidders
103.	The **Bidder Search** page is displayed with search criteria fields that can be used to filter the search results. In this scenario, you want to locate companies in your Service Area that are registered as an SB or DVBE and provide the good/service you are requesting.
104.	Click the **Category** button.

Step	Action
105.	Selecting a **Category** will filter the results to only those companies who are registered to supply that specific UNSPSC code.
106.	Click the **Description** list. begins with
107.	Click the **contains** list item. contains
108.	Click in the **Description** field.
109.	Enter the desired information into the **Description** field. Enter "**furniture**".
110.	Click the **Look Up** button. Look Up
111.	Click the **Furniture** link. Furniture
112.	Click the **Service Area ID** button.
113.	Selecting a **Service Area** will filter the results for only those companies who can do business in that area.
114.	Click the **Sacramento** link. Sacramento
115.	Lastly, select the **Small Business and Disabled Veteran Business Enterprise** options to further refine the results of your search.
116.	Click the **Small Business** option. Small Business
117.	Click the **Disabled Veteran Business Enterprise** option. Disabled Veteran Business Enterprise
118.	Click the **Search** button. Search
119.	Click the **Vertical Scrollbar**.
120.	Click the **Horizontal Scrollbar**.
121.	Click the **Invite** option for line 4.
122.	Click the **Horizontal Scrollbar**.
123.	Click the **Vertical Scrollbar**.
124.	Click the **OK** button. OK

Step	Action
125.	Notice the selected company is now displayed on the **Bidder Invitation List** and will be notified via email of this event.
126.	Click the **Save Event Changes** button. Save Event Changes
127.	After the event changes have been saved, return to the overview page. Click the **< Return to Event Overview** link. < Return to Event Overview
128.	The **Create an Event** page is displayed again. Now that a line item is defined and bidders have been invited to view the event, it is ready to be posted.
129.	Click the **Vertical Scrollbar**.
130.	In the **Step 5: Post Event** section, after all required solicitation information has been entered, you can now post the event. Click the **Post** button. Post
131.	A **Message** window displays. This window provides a warning that the event is about to be sent for approval and will then be posted, limiting the types of edits that can be made to the solicitation. If more changes need to be made before posting, the **Cancel** button could be used to return to the **Create an Event** page. In this scenario, all edits are complete. Click the **OK** button. OK
132.	A **Saved** bubble displays, notifying the user that the solicitation has been saved and routed for approval.
133.	You have successfully completed the "Creating a CSCR entry" topic. **Key Takeaways:** -A solicitation is called an "event" in FI$Cal CSCR -Once a solicitation has been created, files have been attached, line items are defined and bidders have been invited, the solicitation can be posted -The changes that can be made to a solicitation after posting are limited, so FI$Cal asks for confirmation before posting a solicitation **End of Procedure.**