SERVICES Request for Proposal (RFP) Tutorial

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Distribution Statement A. UNCLASSIFIED/Approved for Public Release

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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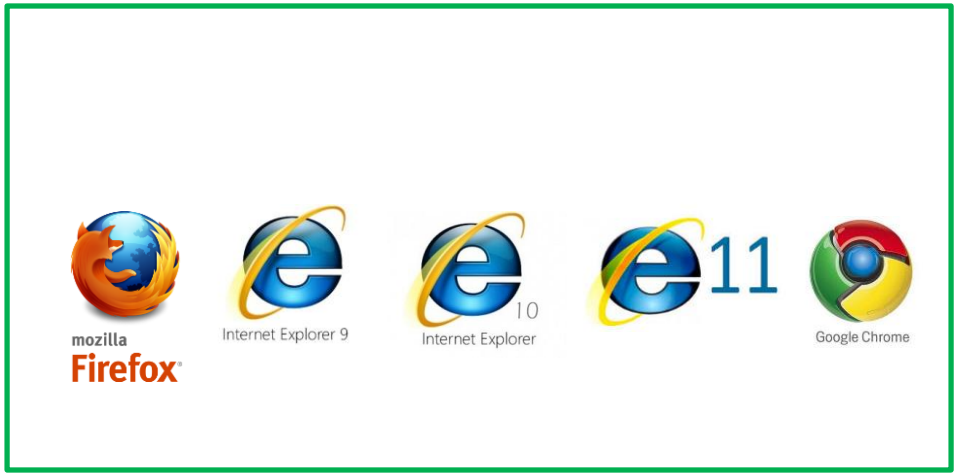
Browser Requirements

Please NOTE:

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

Recommended

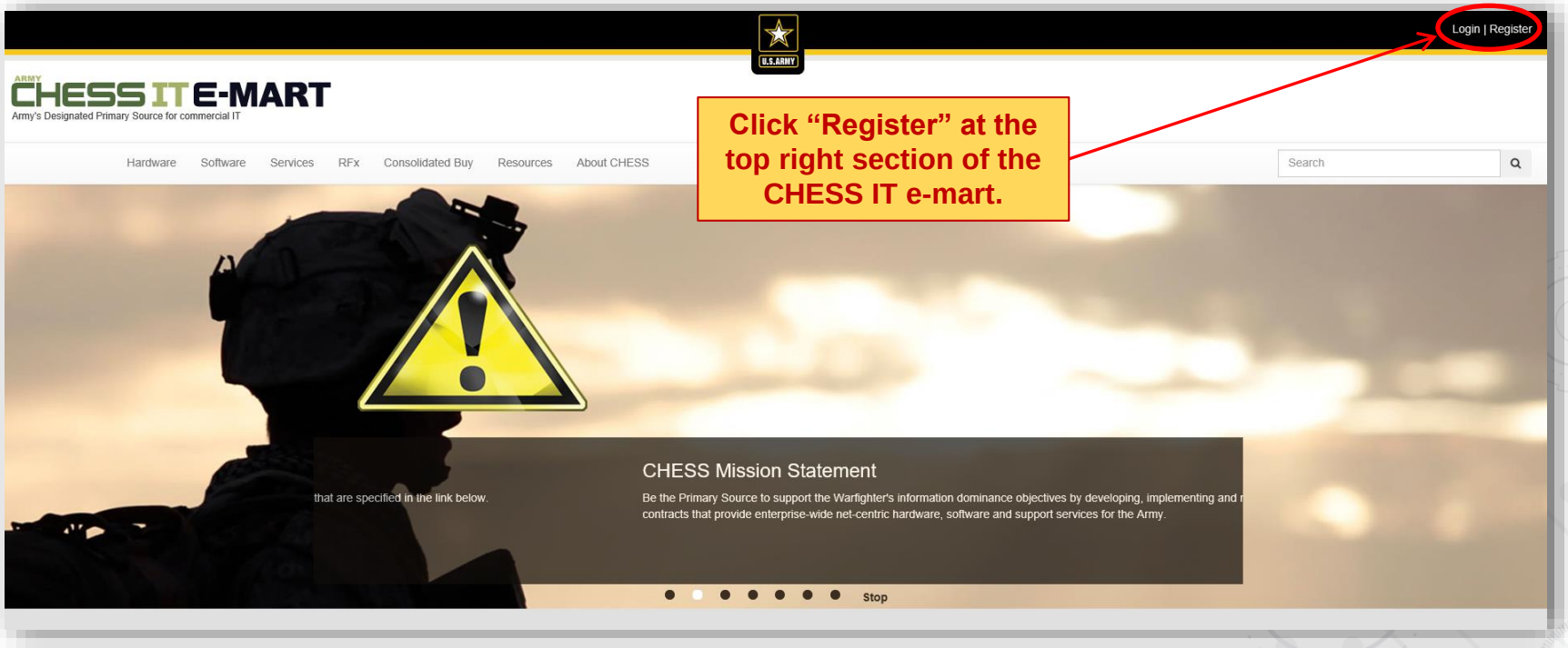


Not Recommended

The RFP Process

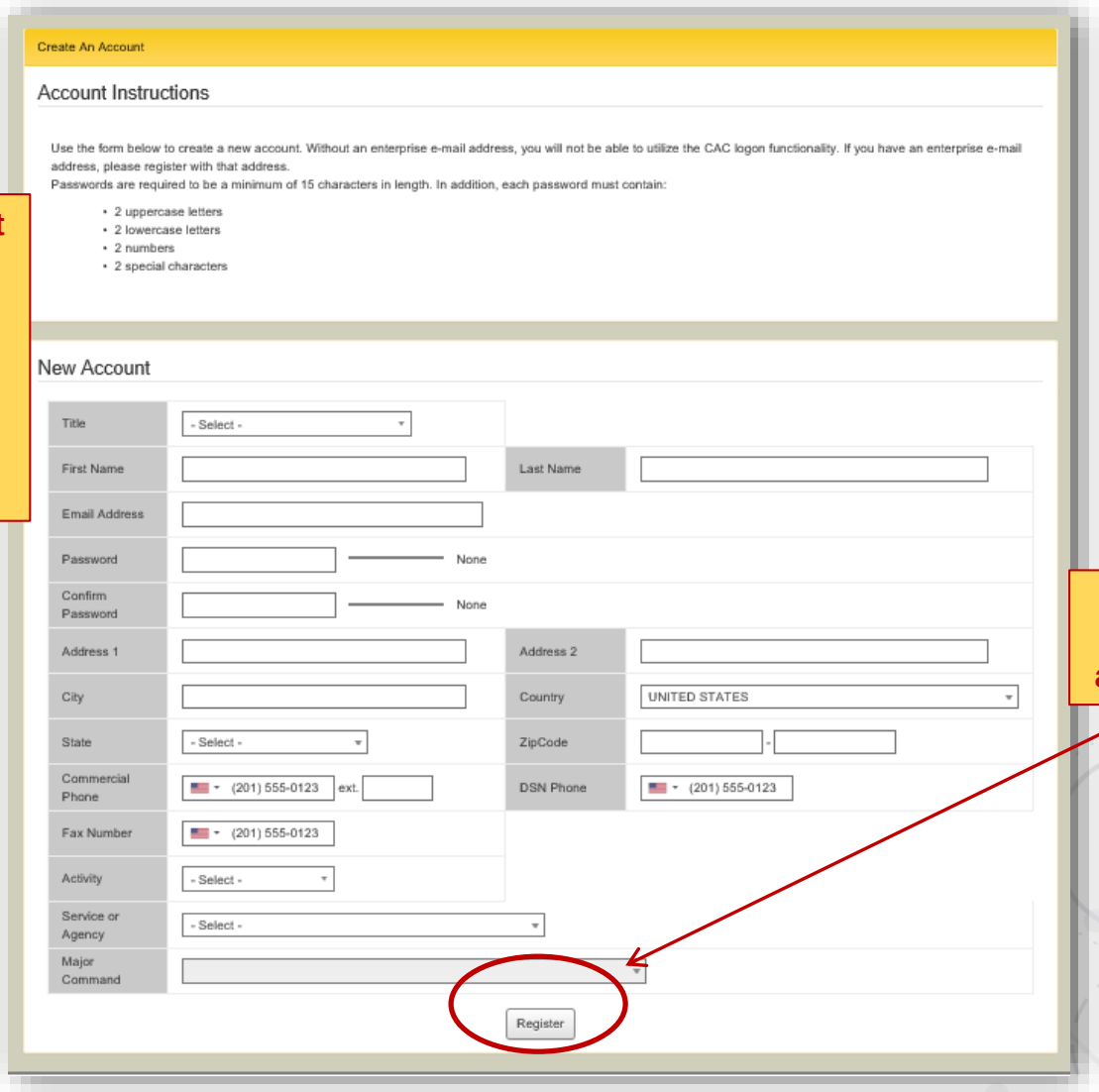
Step 1 - Register

- 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.



Step 2 – Create an Account

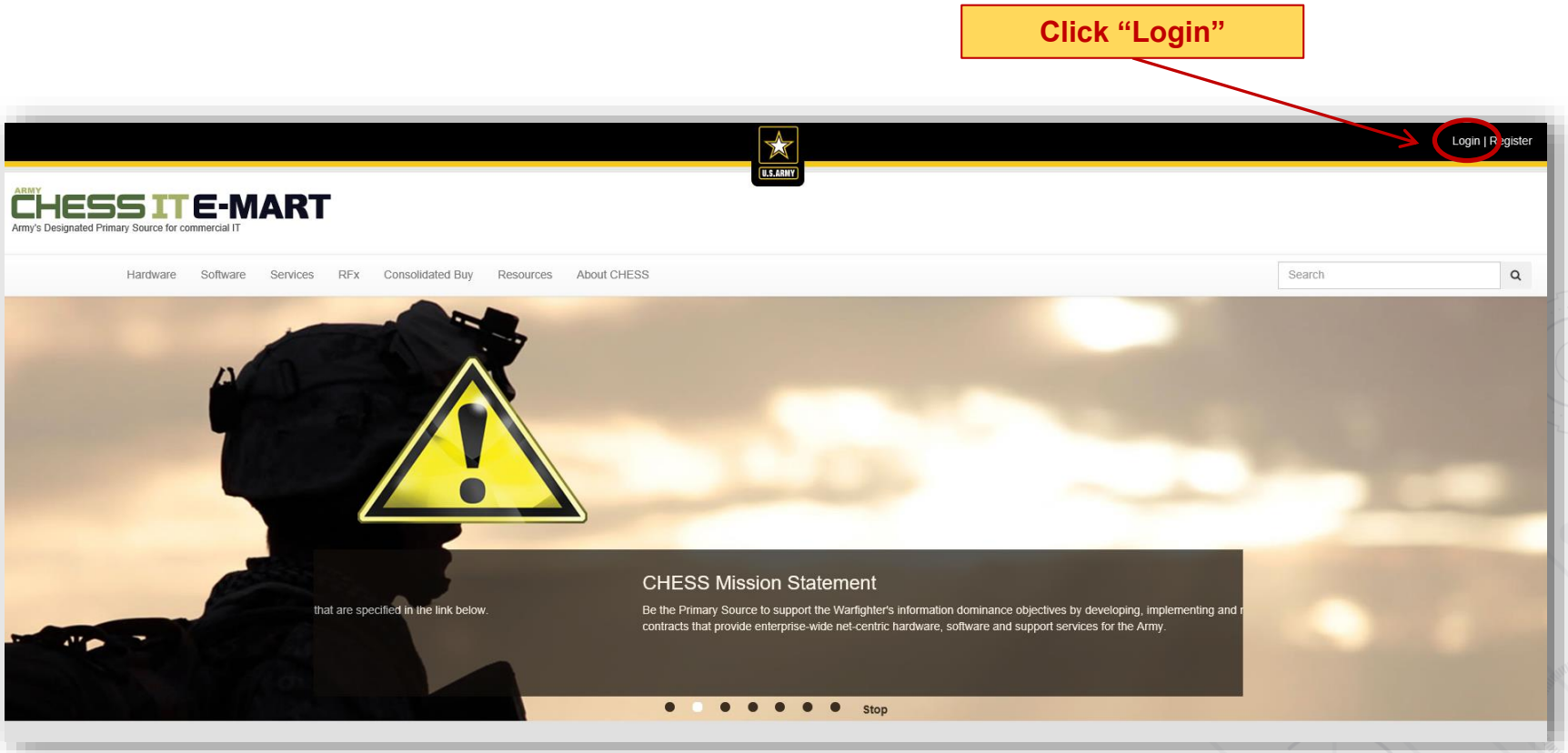
NOTE: CHESS IT e-mart users should ensure their password is unique to CHESS and you do not use passwords from other systems (e.g., network, banking, email, etc.)



Fill out the form with your email address and select "Register"

Step 3 - Login

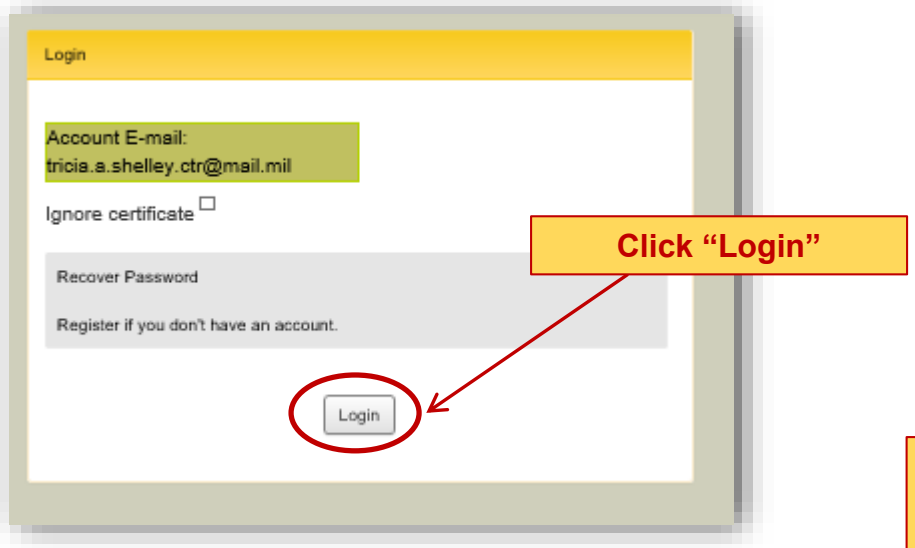
- If you are not automatically logged-in with your CAC, you will need to login in order to gain access to certain pages and tools.



Step 3 - Login (cont'd)

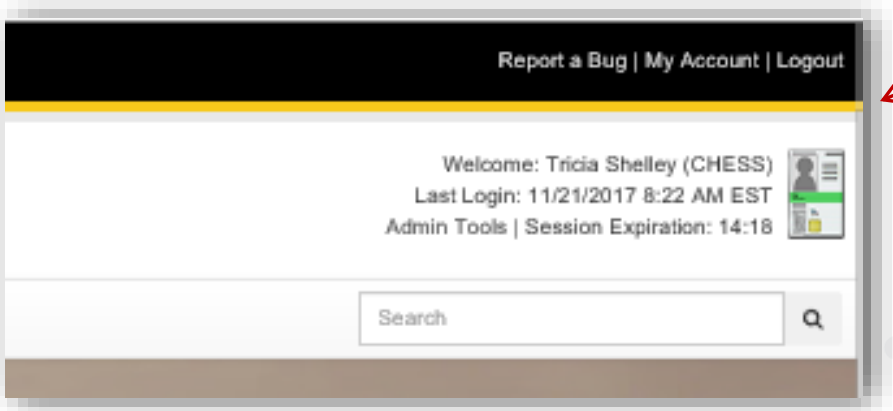
You will need to login to access the RFP process.

After logging in you will be returned to the home page – click on the RFP links again.

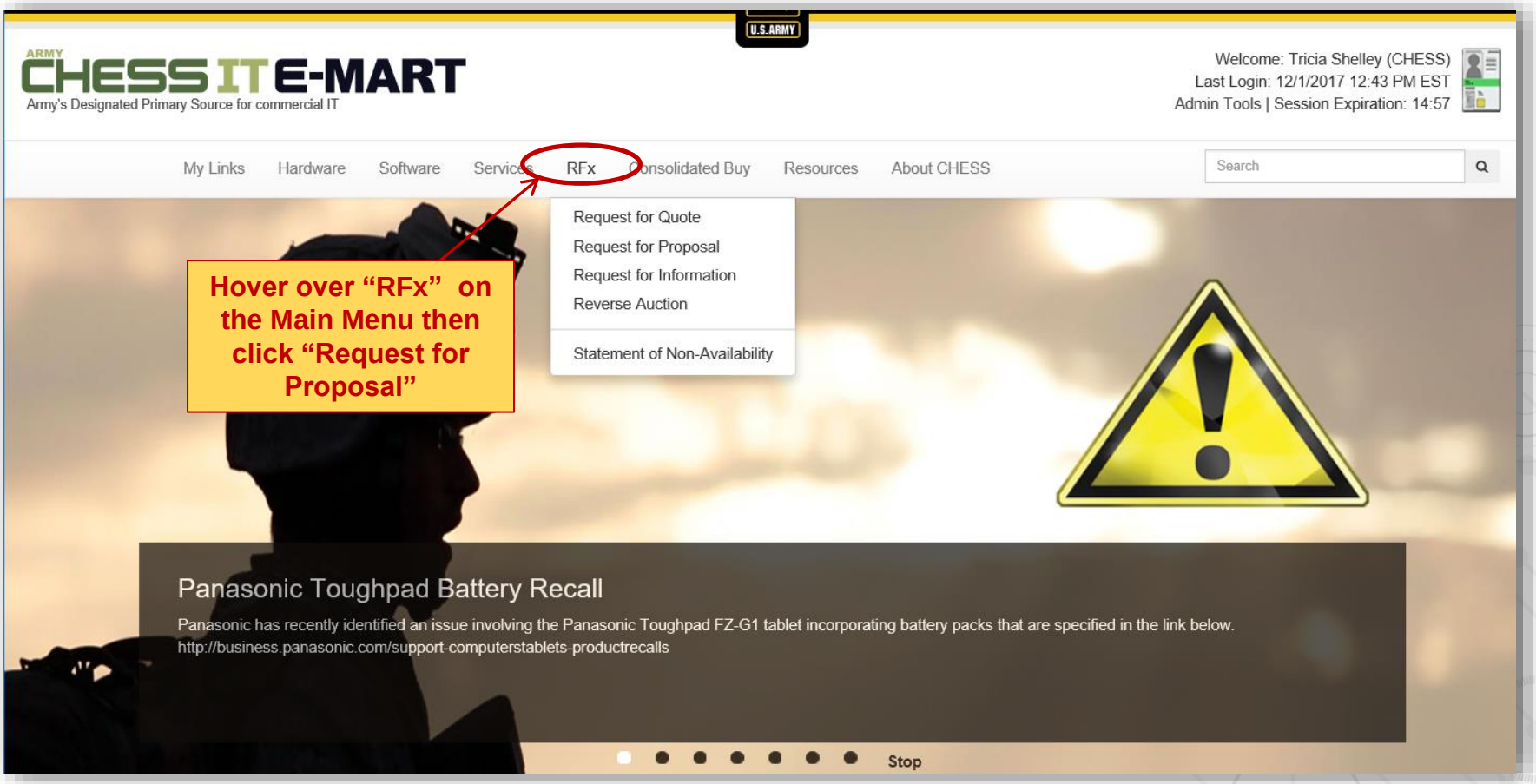


Click "Login"

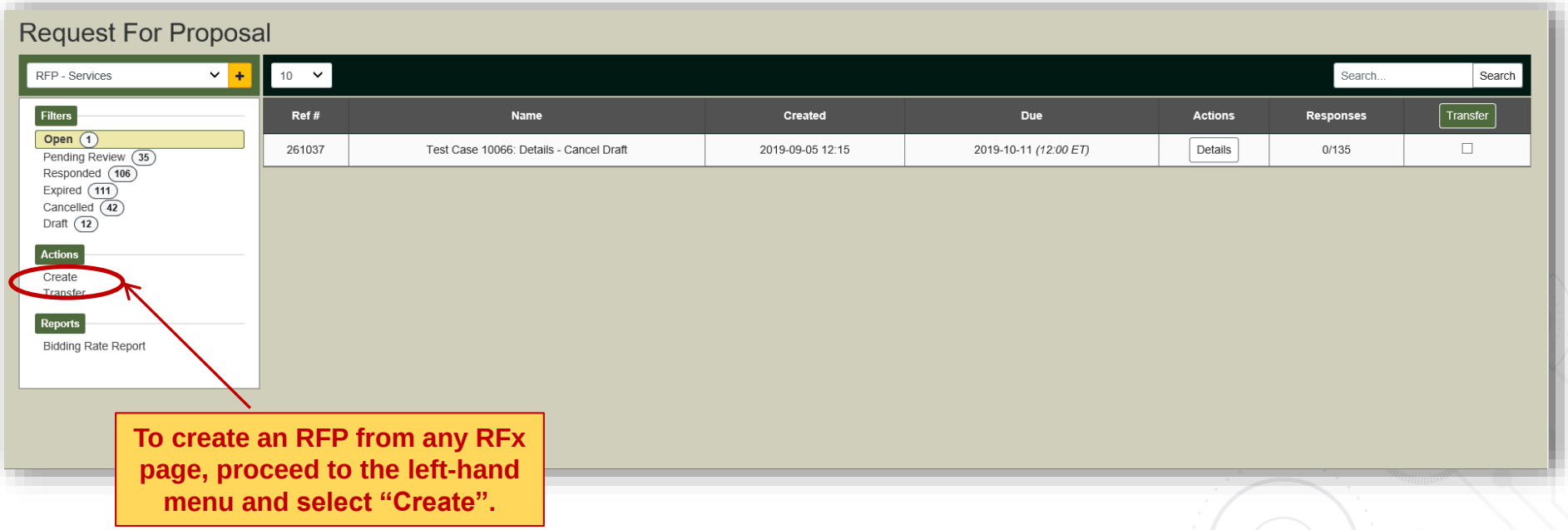
Your name and last login will appear in the top-right corner of the IT e-mart



Step 4 - Access the RFP Tool

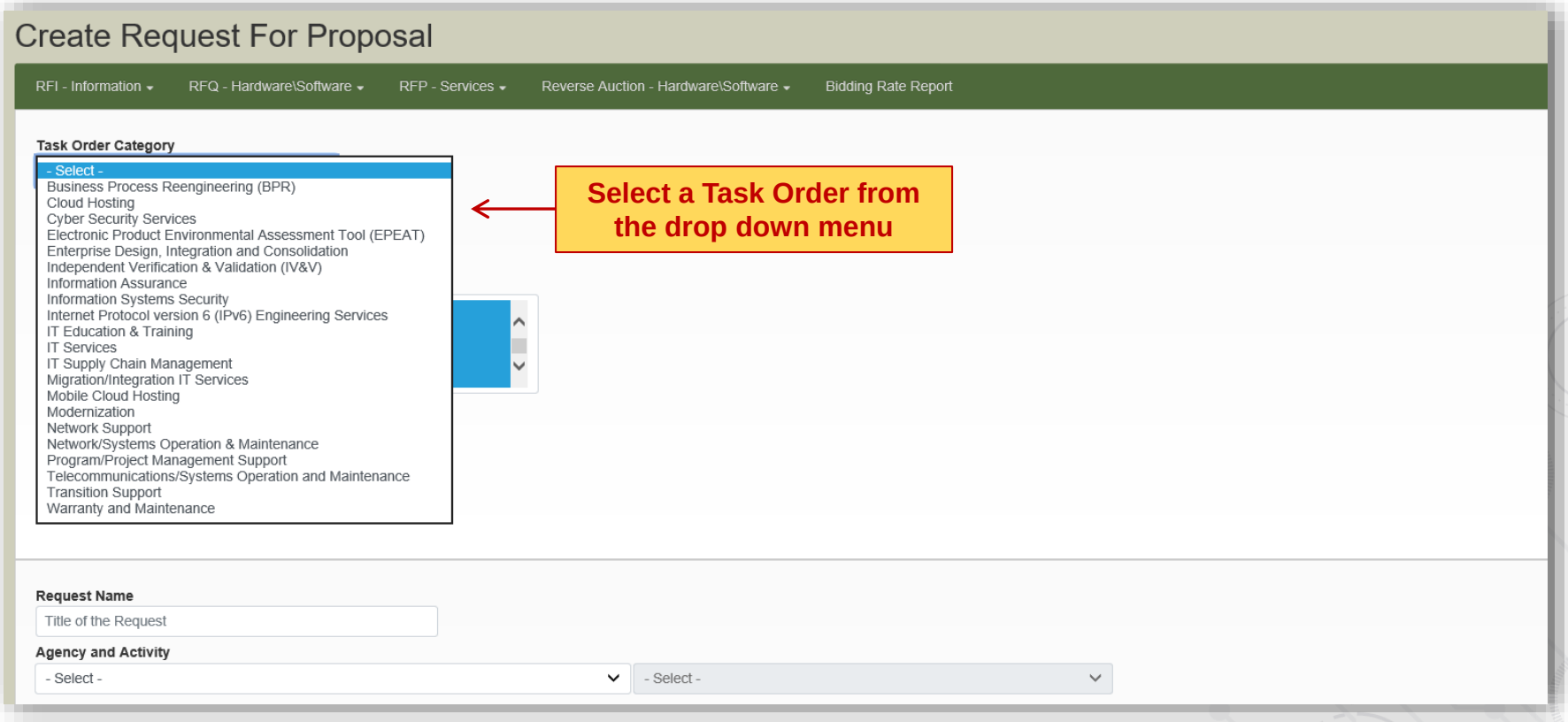


Step 5 - Create an RFP

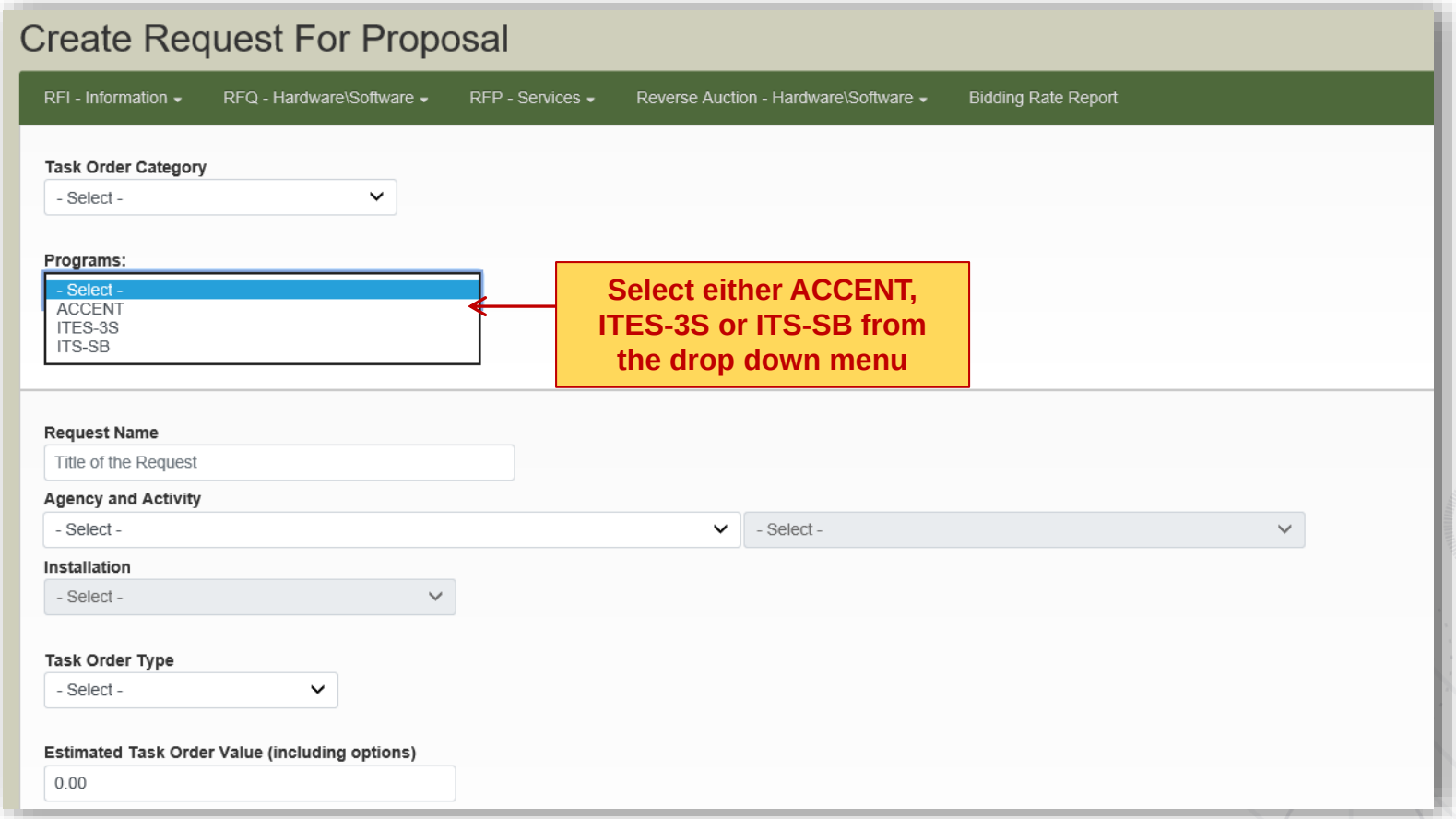


To create an RFP from any RFx page, proceed to the left-hand menu and select “Create”.

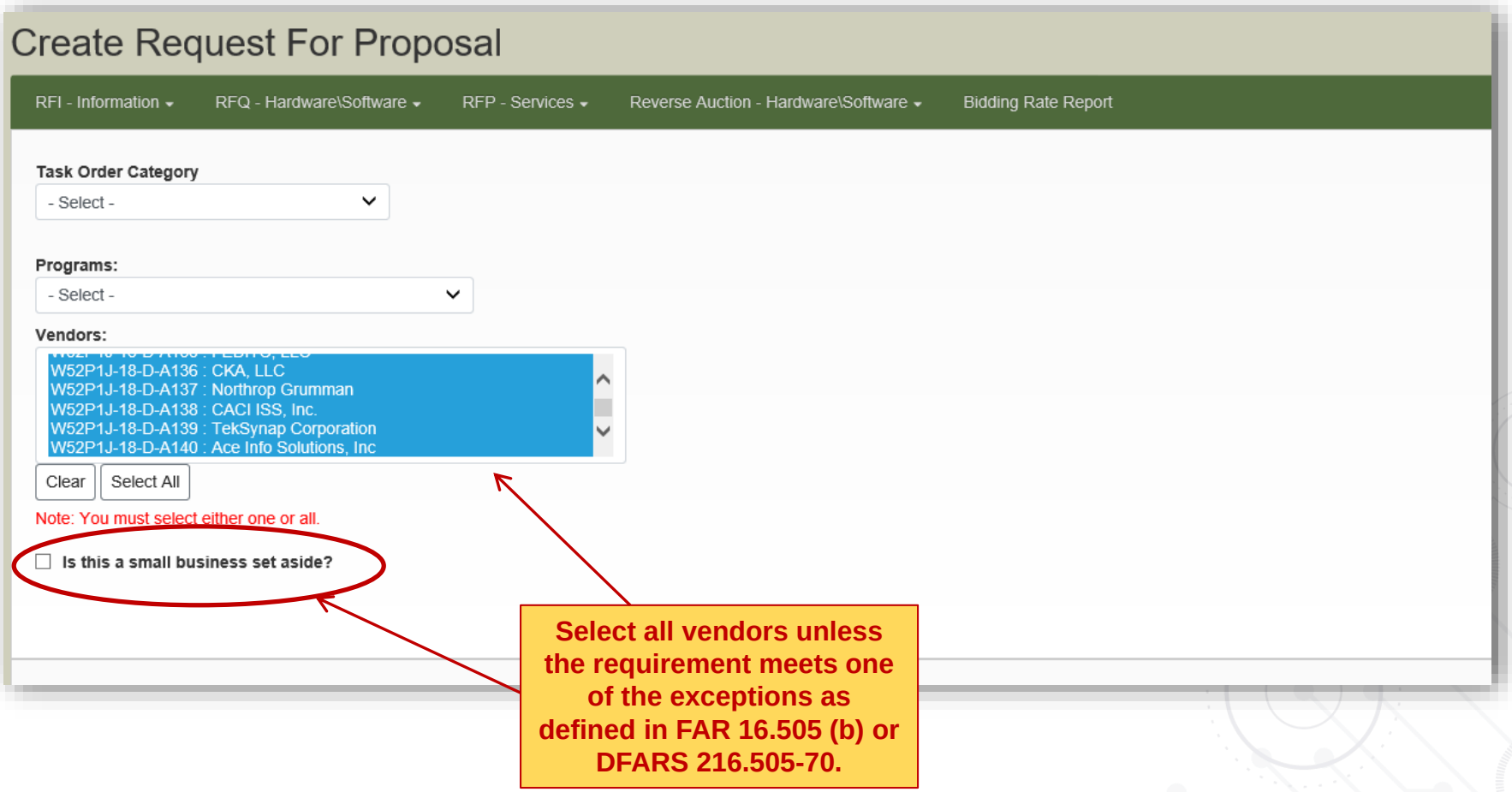
Step 6 - Select Task Order Category



Step 7 - Select Type of Request



Step 8 - Select Vendors



Step 9 - Enter Requirement

Requestor Role

Contract Specialist

Acquisition Title/Subject

Title of the Request

(1) Name the RFP

Agency and Activity

- Select -

- Select -

Installation

- Select -

(2) Select your Agency & Activity

Description

Enter the details of your request. Provide a quantity for each product. Include sufficient information/details about your requirement so that the vendor can provide you with an accurate quote. Include POC information if there is someone the vendors can call/email if there are questions about the requirement. NOTE: You are limited to 4000 characters. Use the file attachment feature below if you need more space

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

Characters left: 4000

Step 10 - 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 Officer (PO).

Attachments

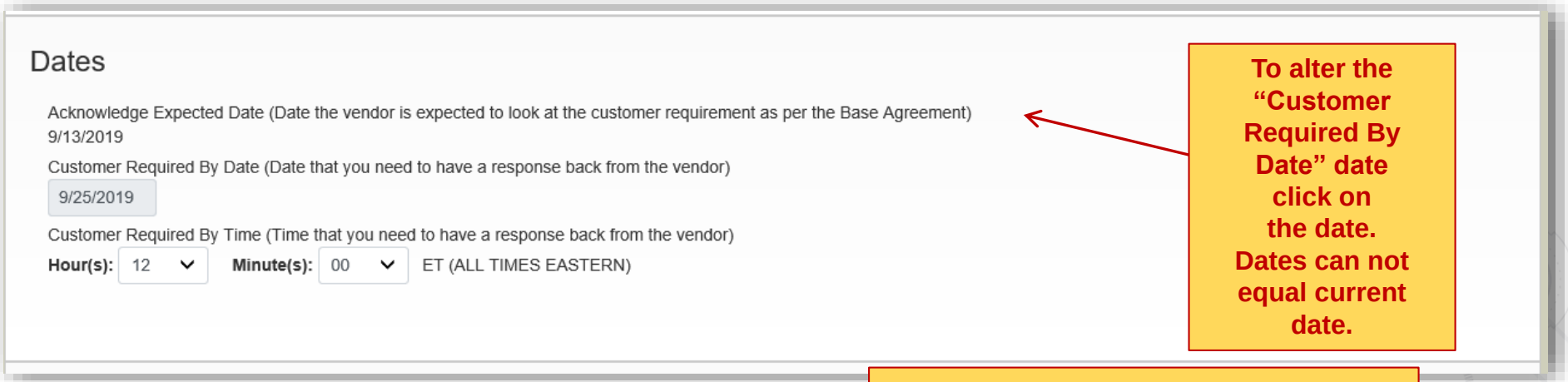
You may upload with a maximum file size of 5 megabytes (MB) per file. Only the following file types will be accepted: **Adobe Acrobat PDF (.pdf)** **Excel (.xls & .xlsx)** **TIFF Files (.tif)** **Word (.doc & .docx)**

	Browse...	Clear
	Browse...	Clear
	Browse...	Clear
	Browse...	Clear
	Browse...	Clear

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

NOTE: Please DO NOT add an attachment with other vendor pricing!

Step 11 - Dates



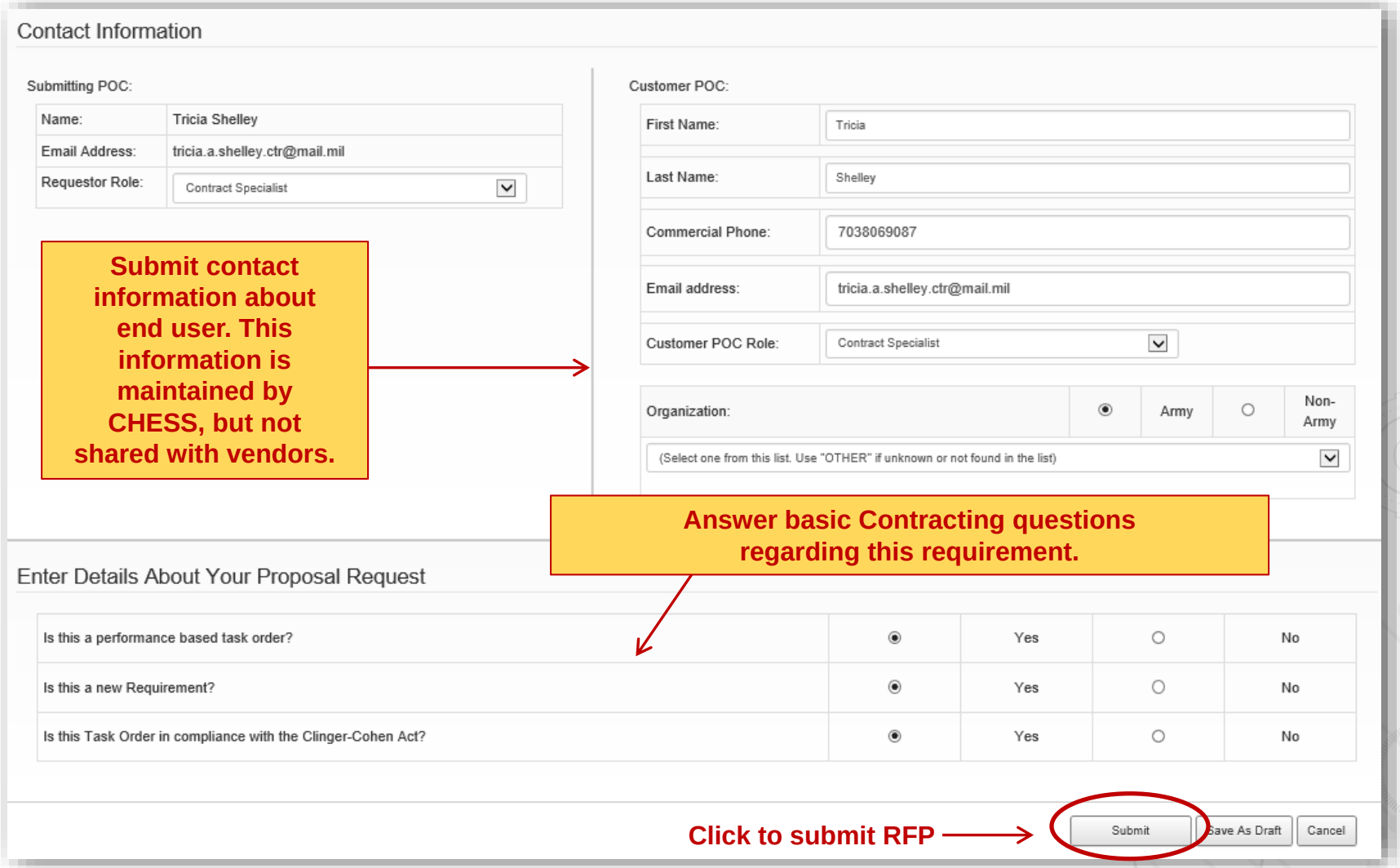
To alter the "Customer Required By Date" date click on the date. Dates can not equal current date.

Date Time Frames

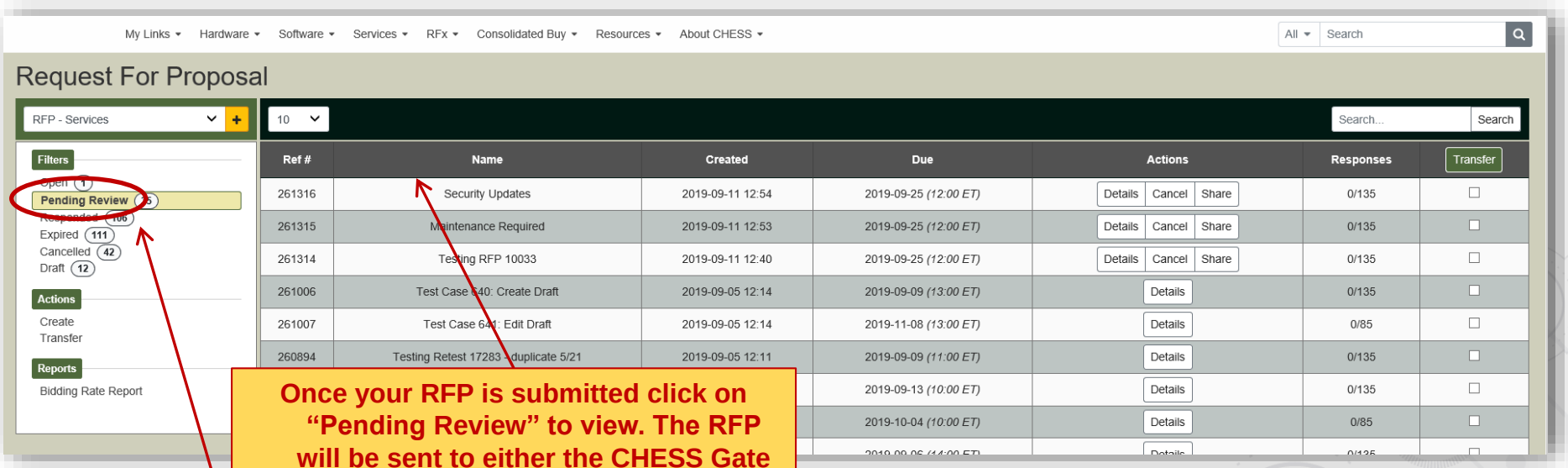
Acknowledge Expected Date: 2 Days
Response Expected Date: 3 Days
Due Date: 10 Days
(Time frame is in business days and does not include holidays)

NOTE: The "Customer Required By Date" can be altered but we ask you follow the time frame when applicable.

Step 12 - POC, Questions & Submit RFP



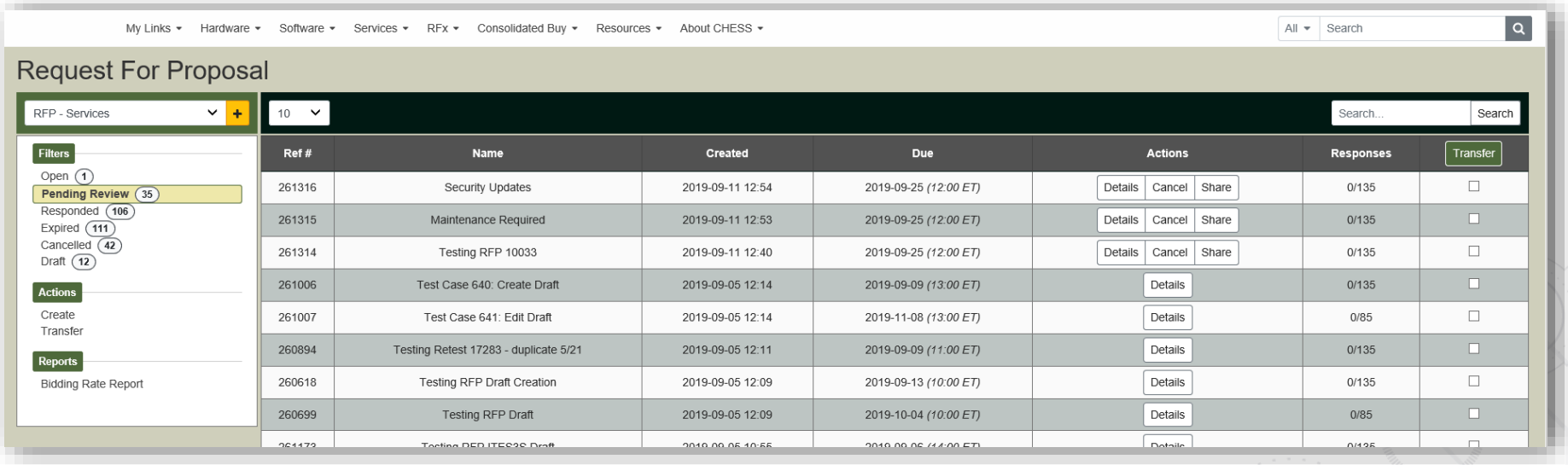
View of successfully submitted RFP



Once your RFP is submitted click on "Pending Review" to view. The RFP will be sent to either the CHESS Gate Keeper or the Army Application Migration Business Office (AAMBO) depending on the contract vehicle selected. Upon review, your RFP will either be released to the vendor(s) for action "Open" or administratively canceled.

NOTE: RFP's will not be visible to the vendors until the gatekeeper accepts the RFP submission

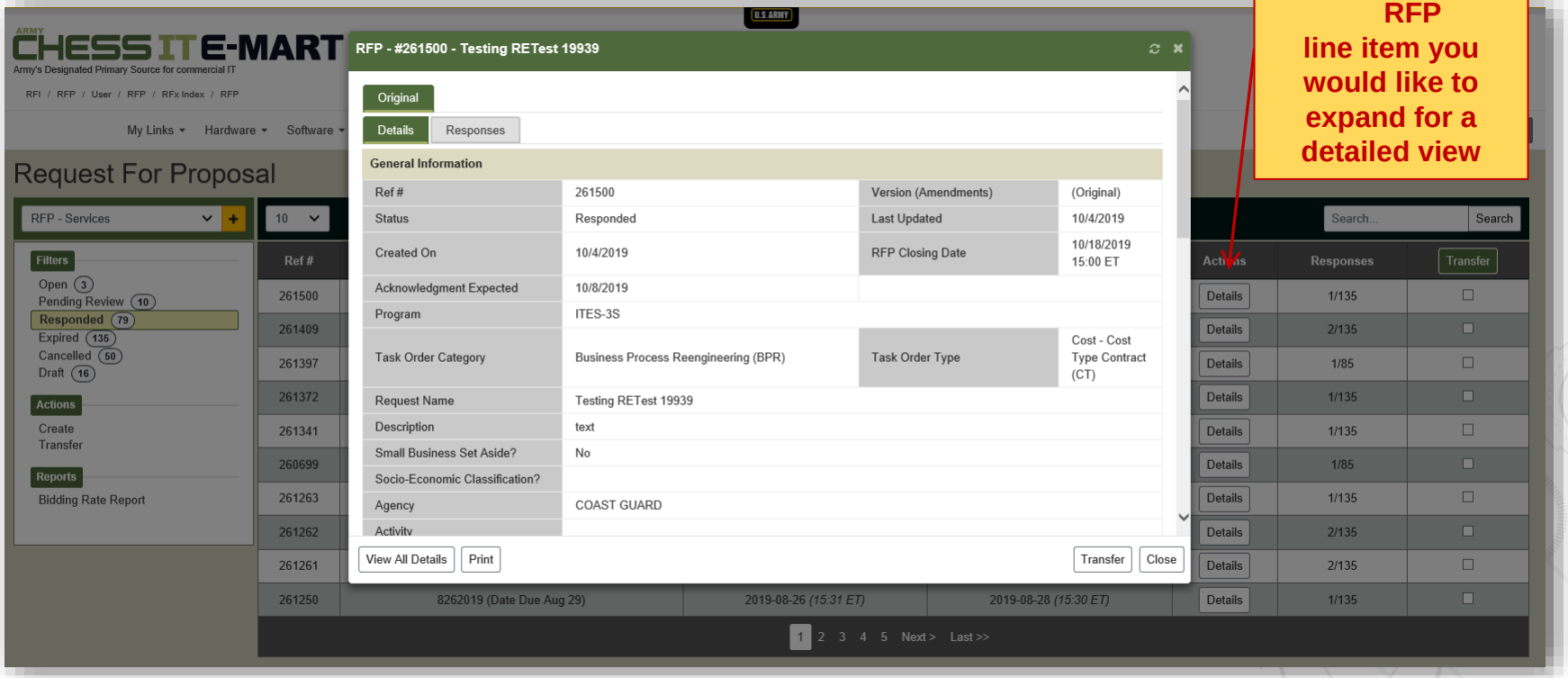
View of successfully submitted RFP



Once your RFP is submitted and approved your screen will look like this. The RFP index will show your recently submitted RFP at the top 9 of the index.

NOTE: Your screen will automatically update every 90 days and auto archive outdated RFP's

View of successfully submitted RFP



The RFP Process After Submission

- The Contracting Officer or Contract Specialist RFP submission will be sent to either the CHESS Gate Keeper or the Army Application Migration Business Office (AAMBO). Upon review, your RFP will either be released to the vendor(s) for action “Open” or administratively canceled.
- Once approved 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.

Email to Contracting Officer or Contract Specialist

- Once your RFP is approved you will receive an email from CHESS like the one below.

Dear Tricia Shelley,

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

Title: Testing RFP
Program: ITES-2S
Reference Number: 206222
Description: Testing RFP
Date Created: 1/3/2018
Customer Required By Date: 1/10/2018
Vendors Selected:
Apptis Inc.
IBM
Leidos
Northrop Grumman
NCI Information Systems
Dell Federal Systems
CSRA LLC
HP Enterprise Services
BAE
STG, Inc.
Booz Allen Hamilton, Inc.
CACI ISS, Inc.
SAIC
General Dynamics
Pragmatics, Inc.
Harris IT Services Corporation

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

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

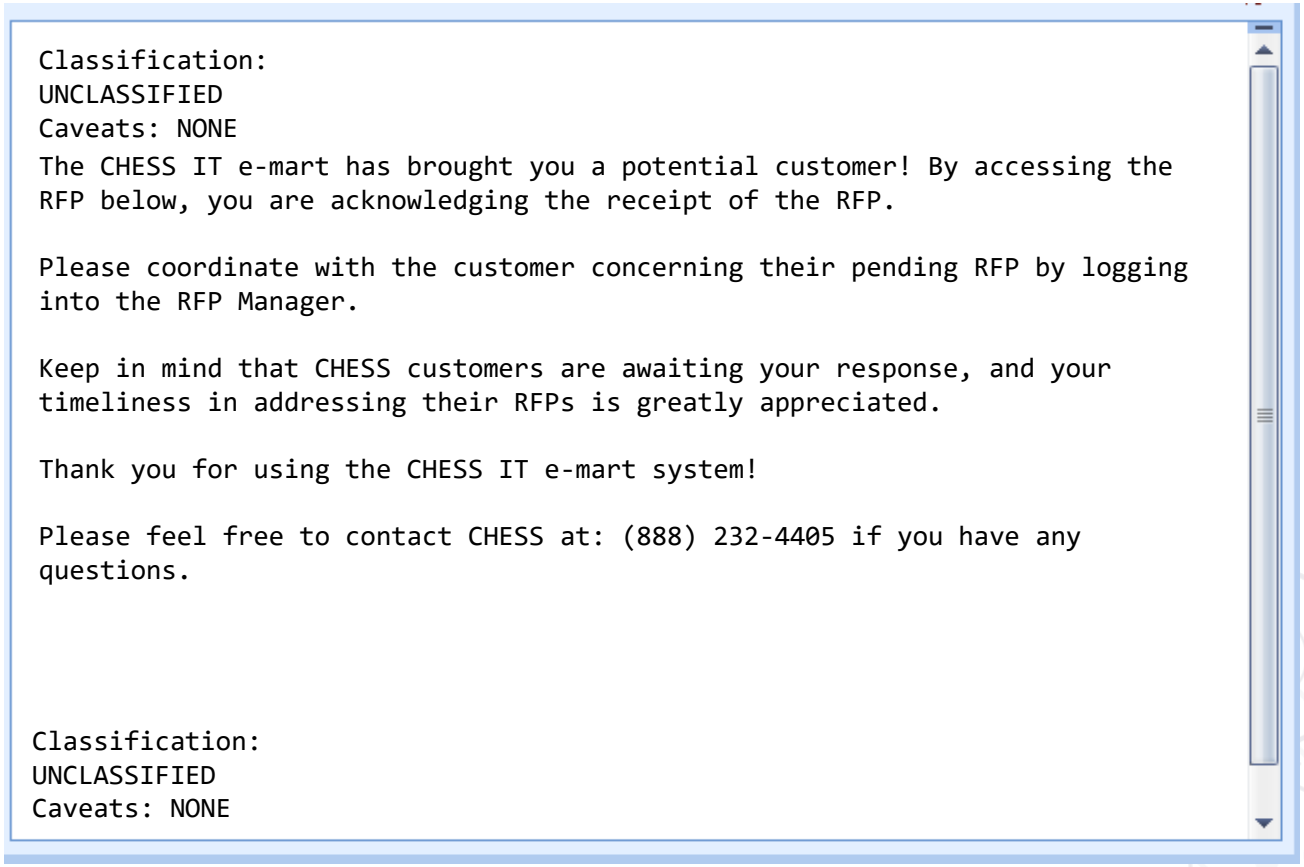
Thank you for using the CHESS IT e-mart system!

This email was generated automatically. DO NOT REPLY. Questions should be directed to the CHESS Customer Support Team at: armychess@mail.mil or (888) 232-4405.

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.



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.

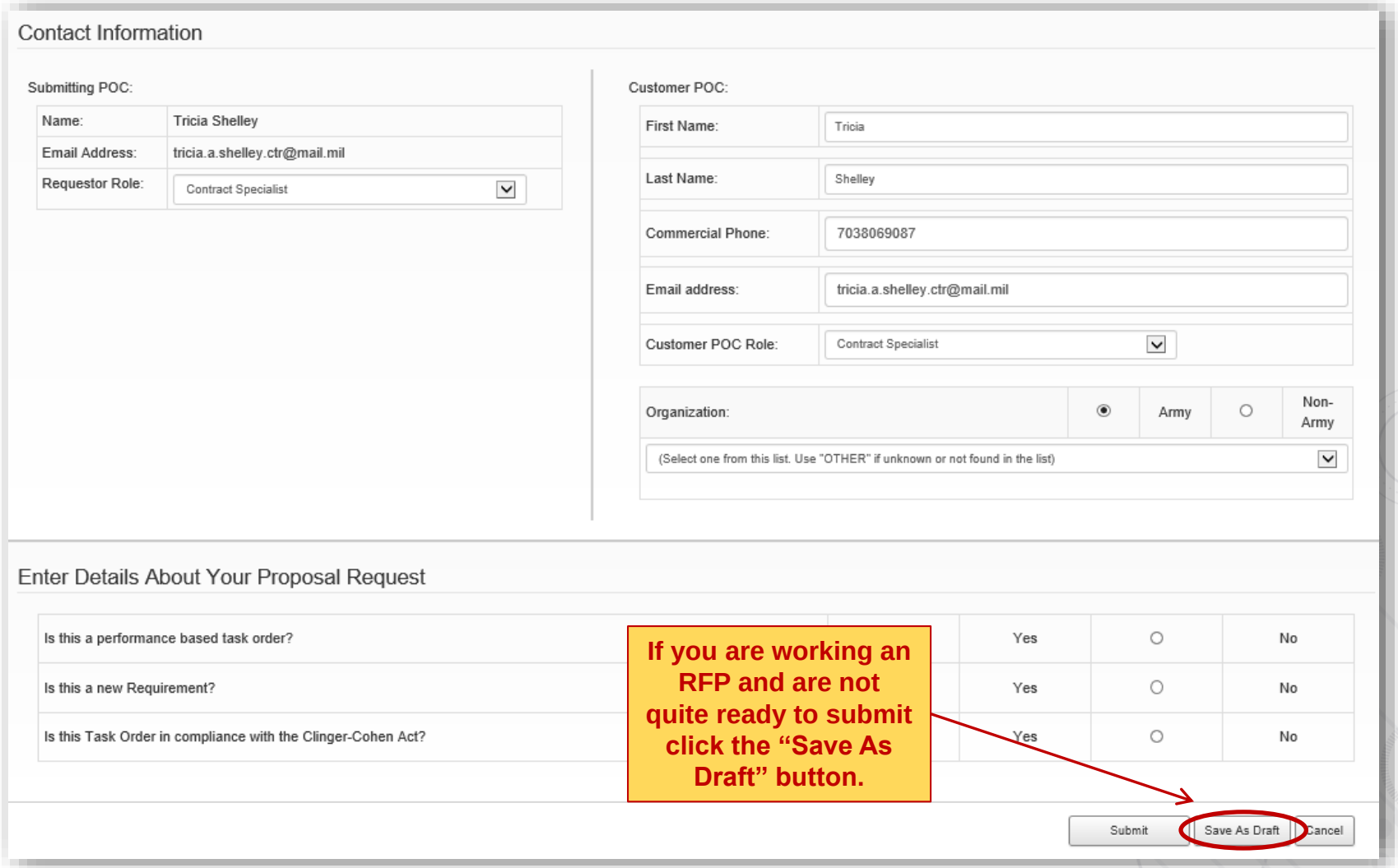
Thank you for using the CHESS IT e-mart system!

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

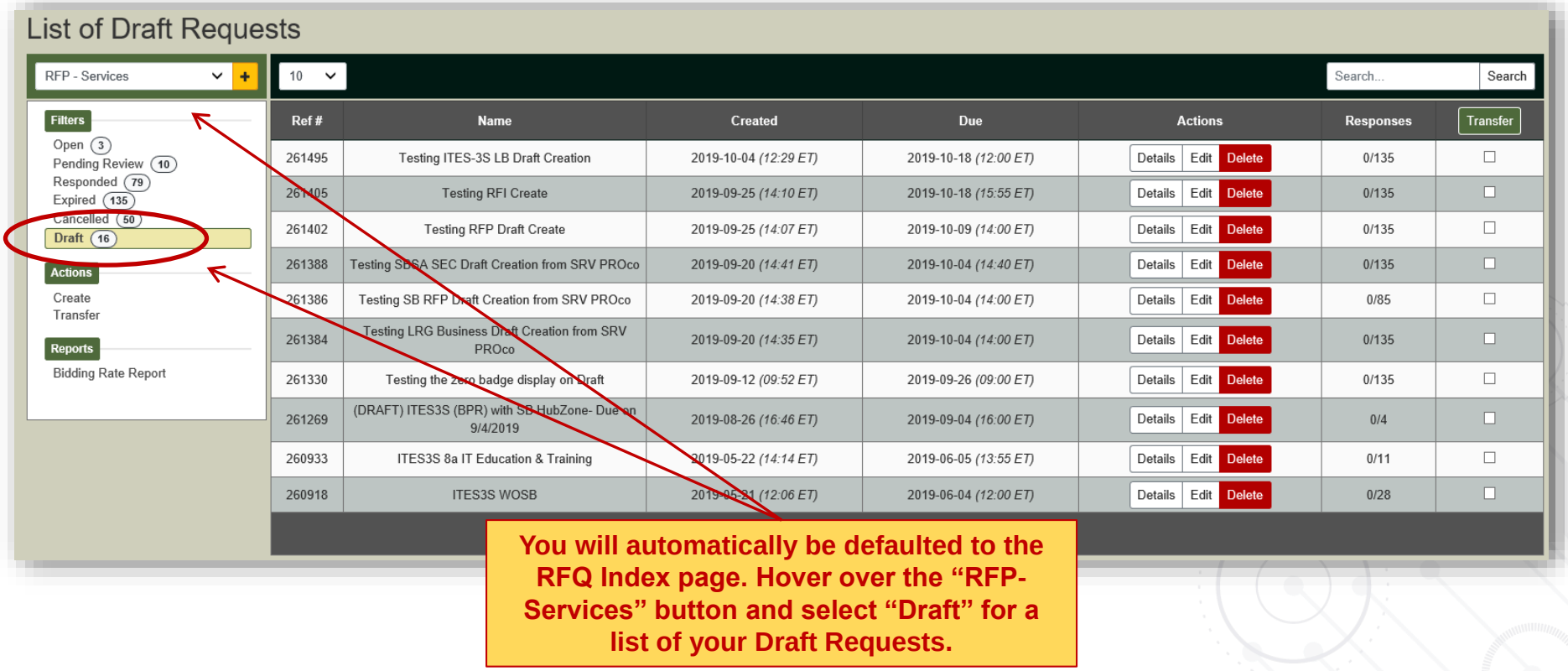
Classification:
UNCLASSIFIED
Caveats: NONE

Creating a Draft RFP

Step 1 - Save as Draft



Step 2 - View RFP Drafts

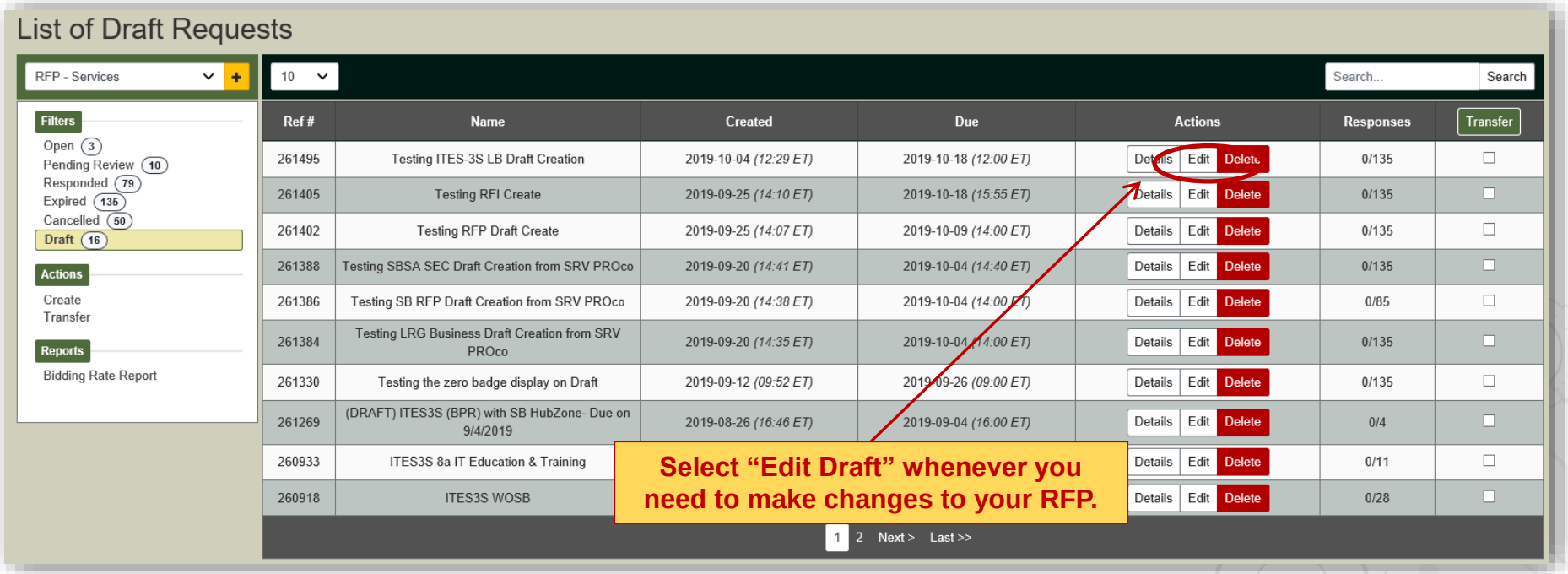


You will automatically be defaulted to the RFQ Index page. Hover over the "RFP-Services" button and select "Draft" for a list of your Draft Requests.

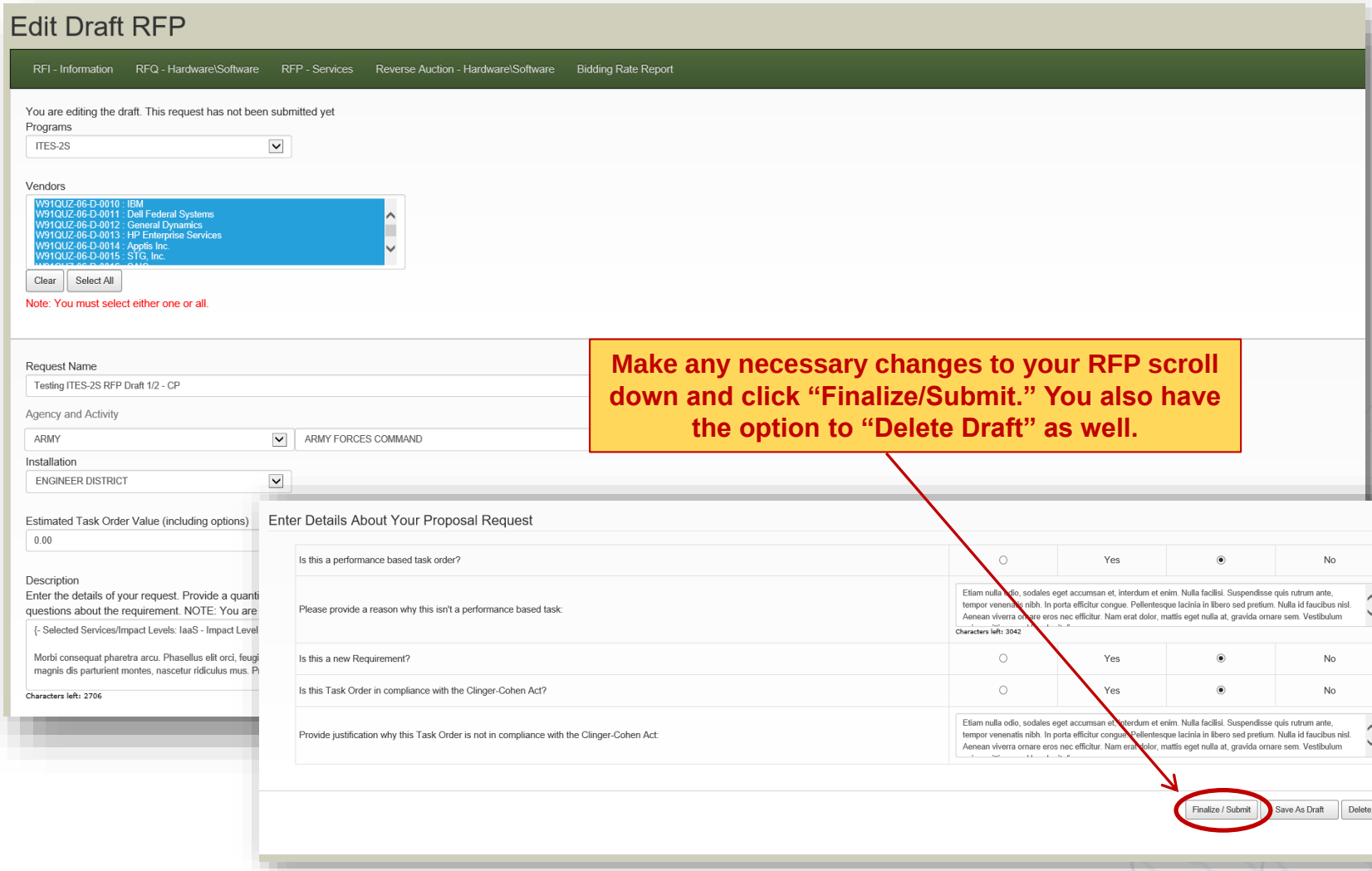
Step 2 - View RFP Drafts continued

On this page all the Drafts RFP's you are currently working on will be listed.

Step 3 - Edit Draft



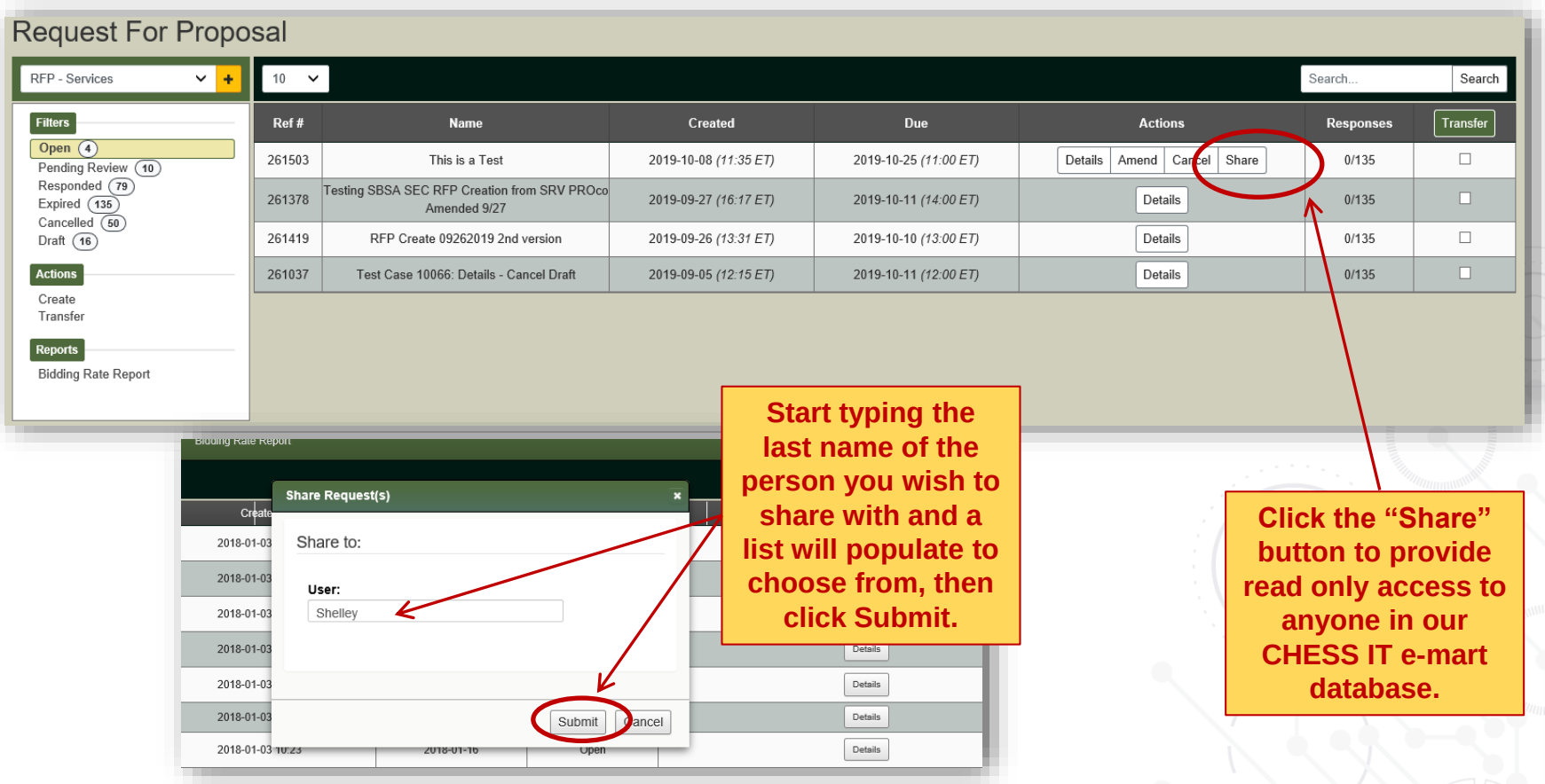
Step 4 - Make Changes & Submit



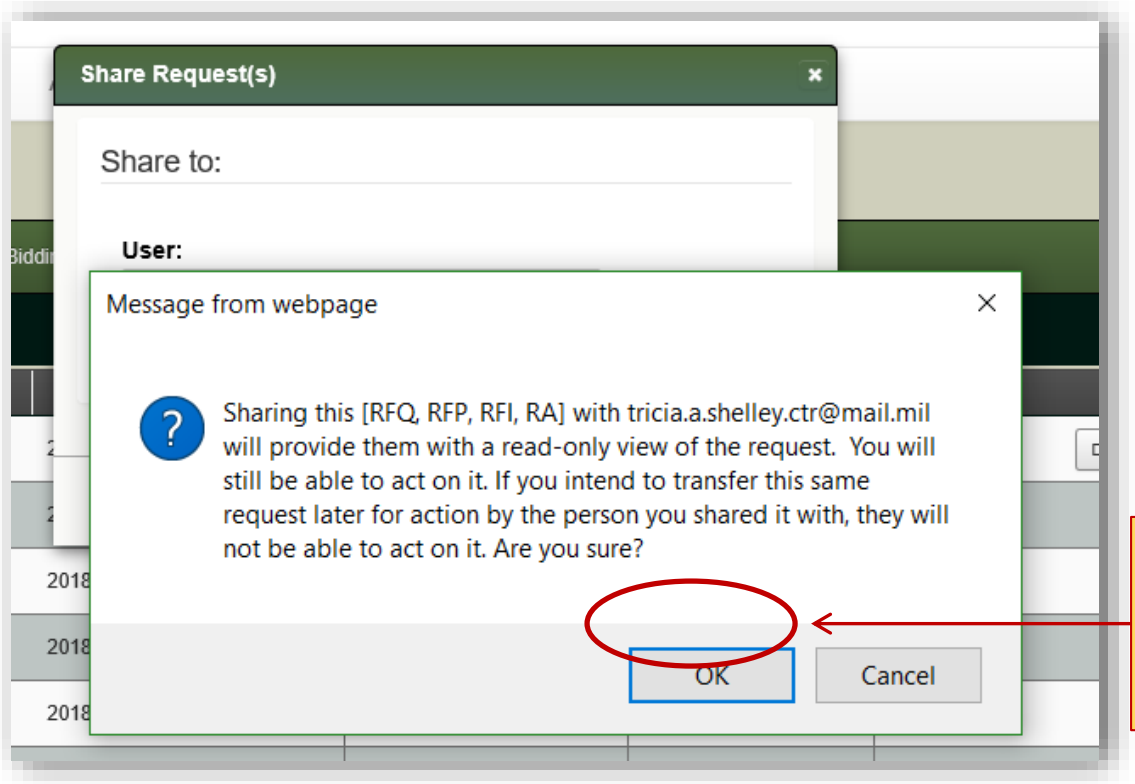
Sharing an RFP

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.



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.

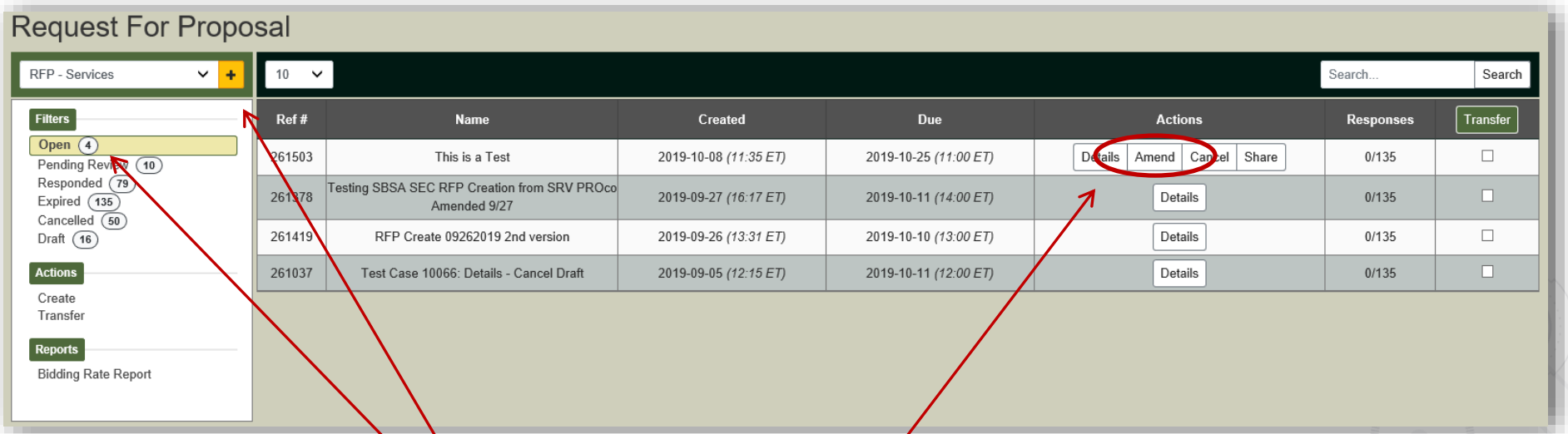
Amending an RFP

Amending an RFP

The **Amendment** feature allows you to:

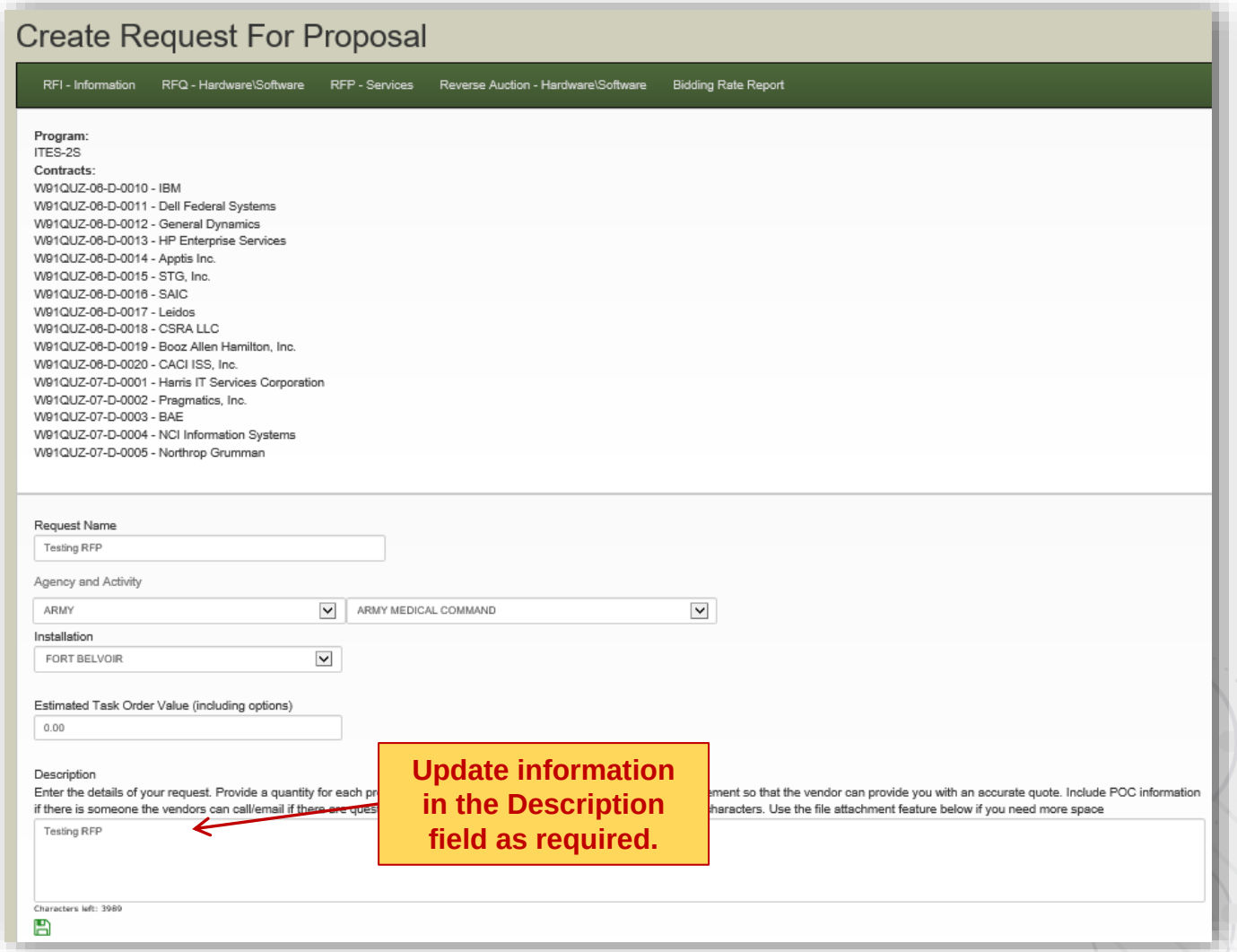
- Update an RFP at any time in the process
- Clarify the details of a requirement
- Notify vendors of updates or new deadlines

Amending an RFP

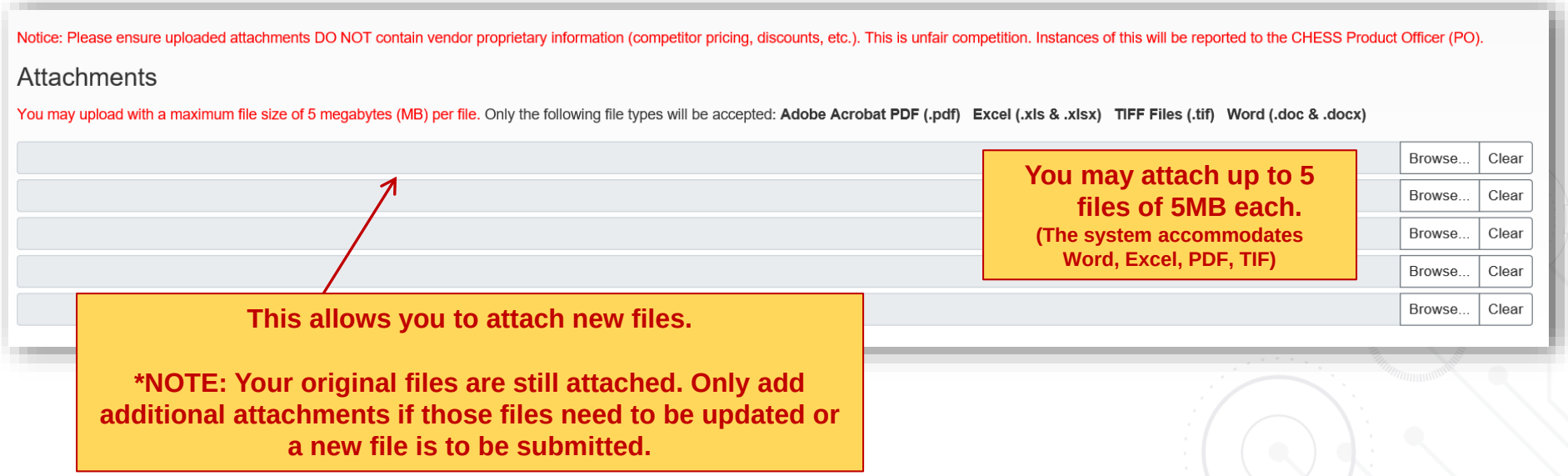


Ensure you are on the "RFP - Services" Index page and within the "Open" tab, then click the "Amend" link to the right of your RFP.

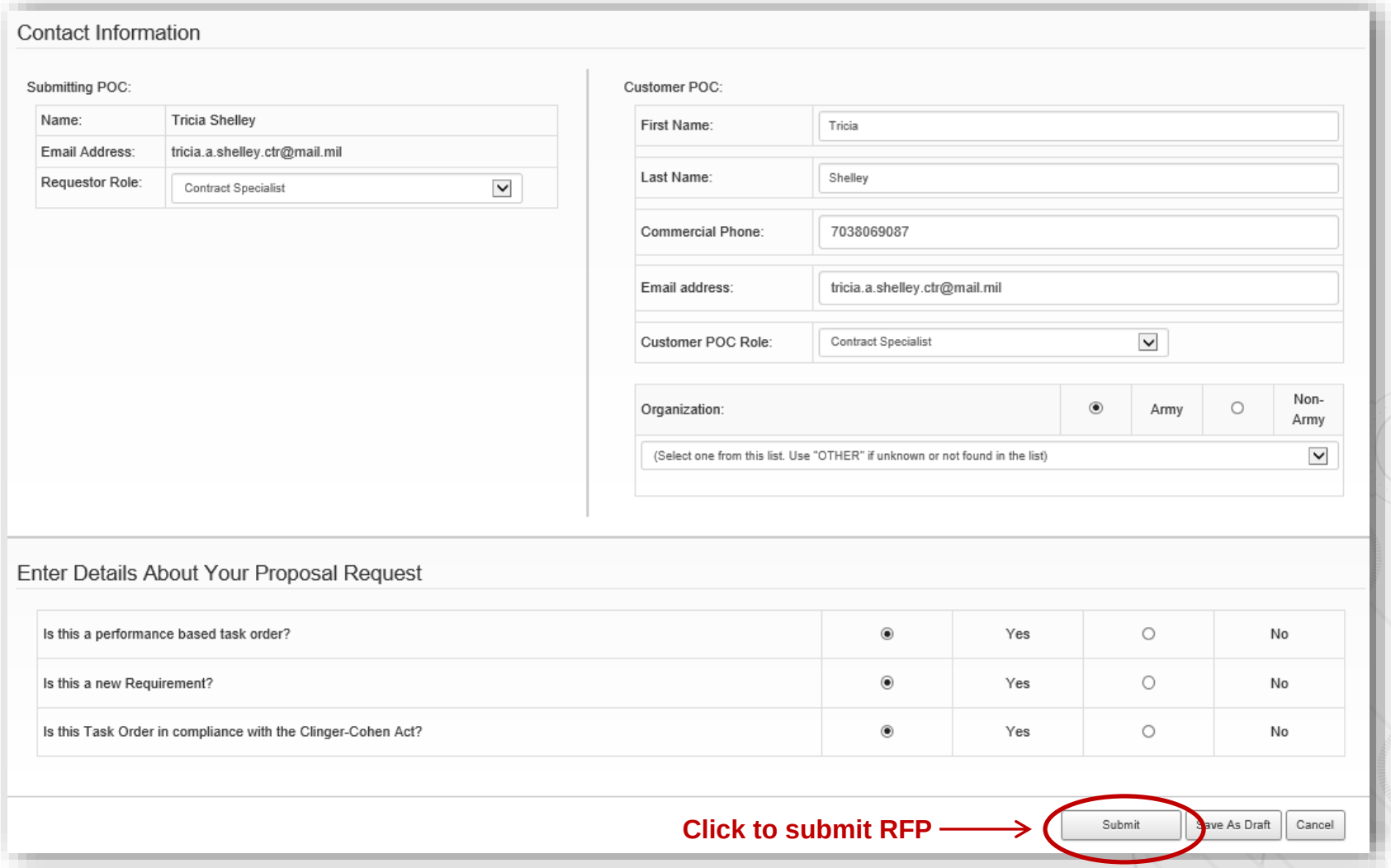
Amending an RFP



Amending an RFP

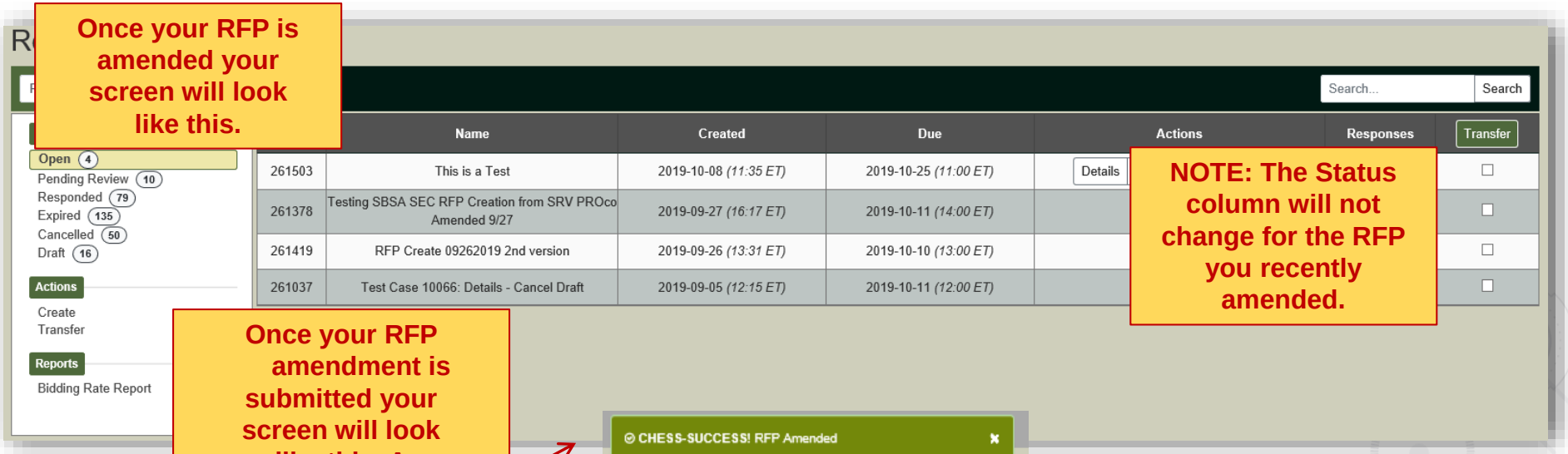


Amending an RFP



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.

Once your RFP amendment is submitted your screen will look like this. A bar at the bottom of the page will indicate that your RFP has been amended.

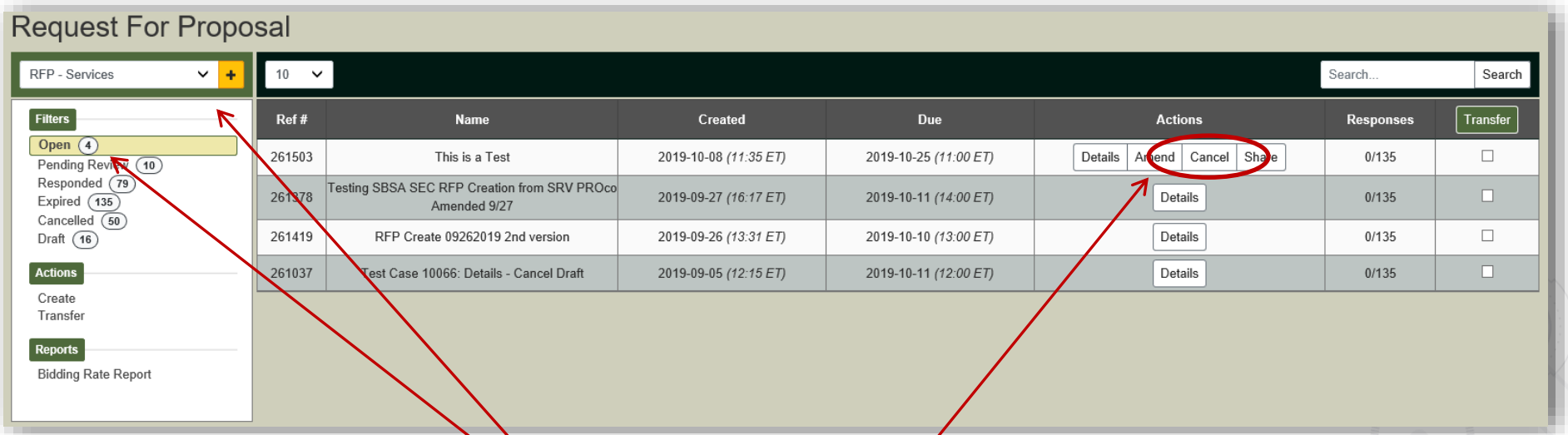
Cancelling an RFP

Cancelling an RFP

The **Cancel** feature allows you to:

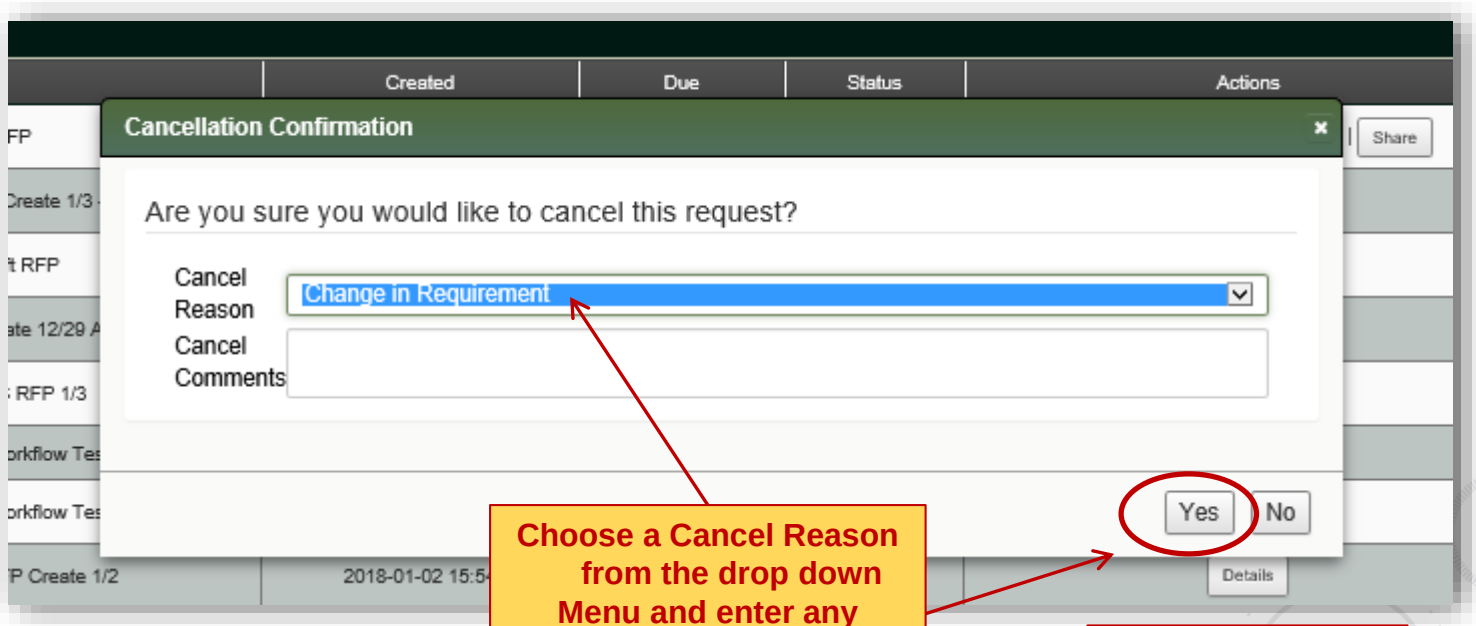
- Cancel an RFP at any time in the process
- Notify vendors of updates and the cancellation of an RFP
- The Contracting Officers or Contract Specialists may both cancel RFPs

Cancelling an RFP

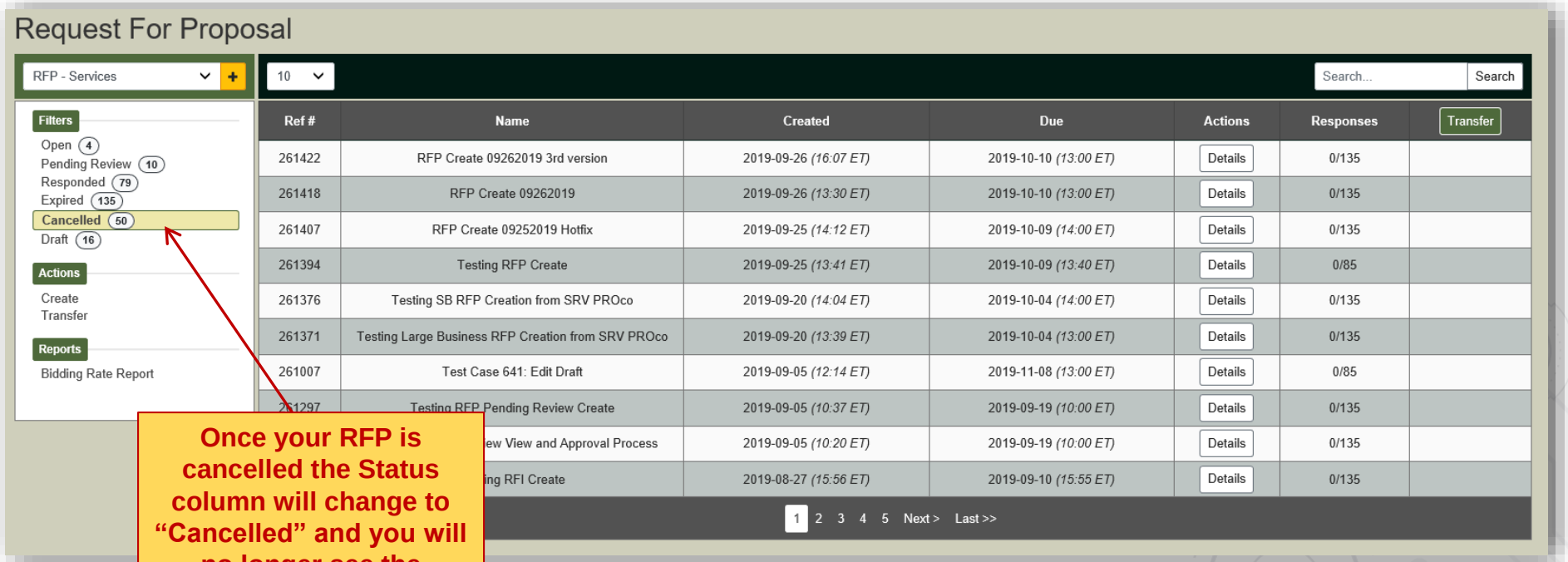


Ensure you are on the "RFP - Services" Index and within the "Open" filter page then click the "Cancel" link to the right of your RFP.

Cancelling an RFP



Cancelling an RFP



Once your RFP is cancelled the Status column will change to "Cancelled" and you will no longer see the cancelled RFP in the "Open". To view cancelled RFP's you will need to select the "Cancelled" filter.

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

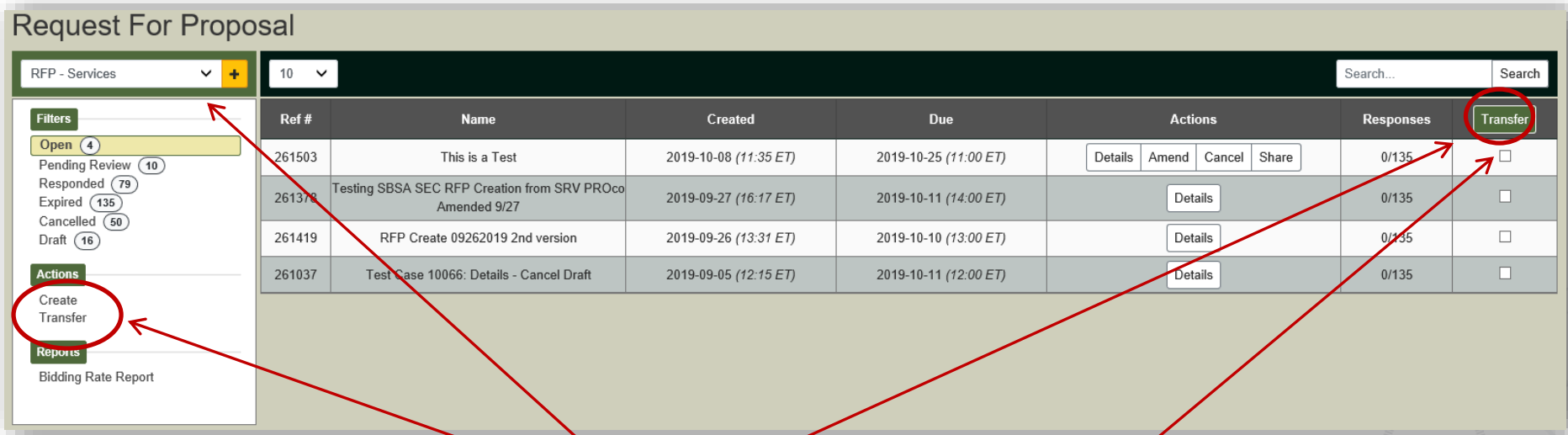
Transferring an RFP

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

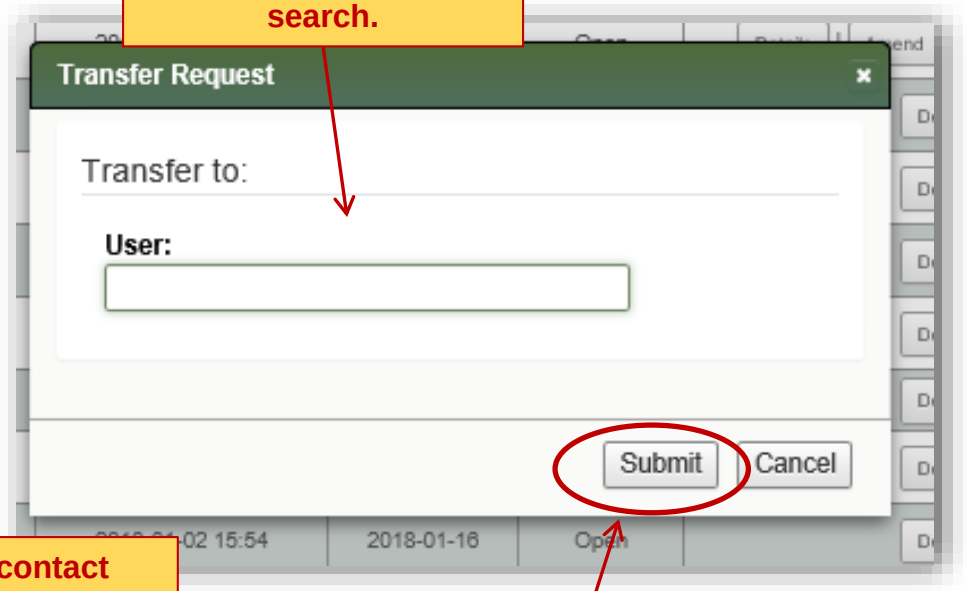


Ensure you are on the "RFP - Services" Index Page then click the checkbox under the Transfer column found to the right of your RFP and then click "Transfer" either in the Transfer column or under the "Actions" filter.

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

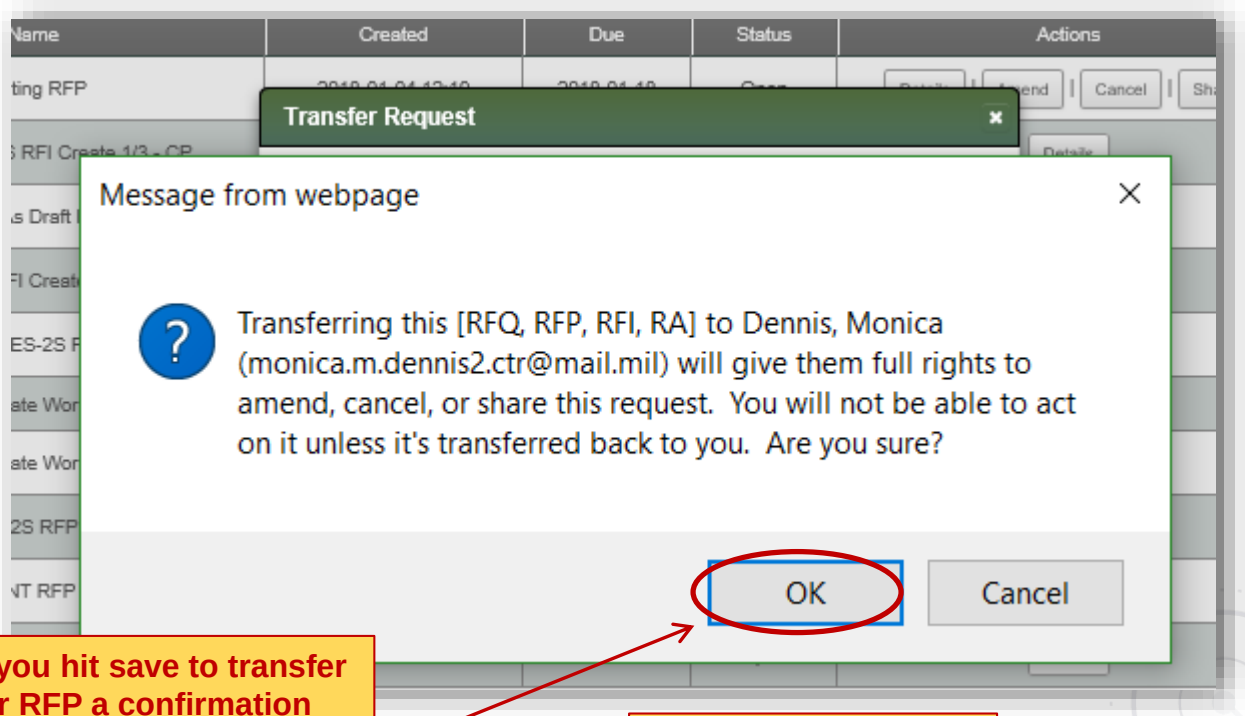
Once you start typing this field will auto populate with a list of users pertinent to your search.



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

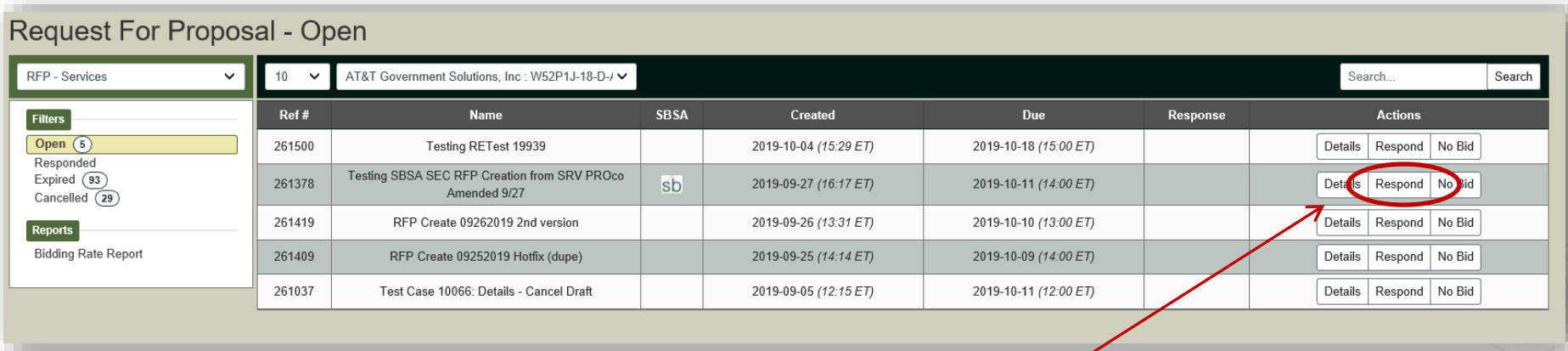


Once you hit save to transfer your RFP a confirmation screen will appear. Click OK to continue. Once you refresh your screen your RFP will no longer appear.

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

Vendor View of RFP Submissions

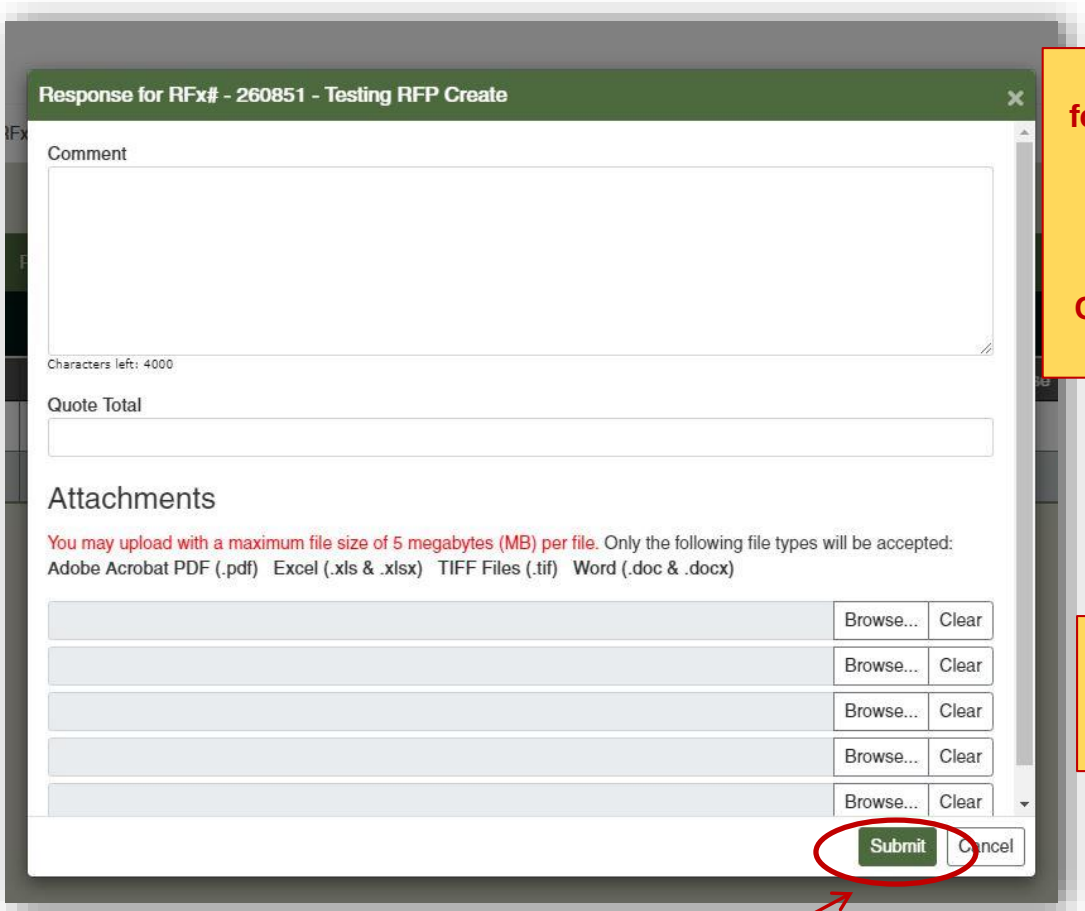
Vendor View of RFP Response



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



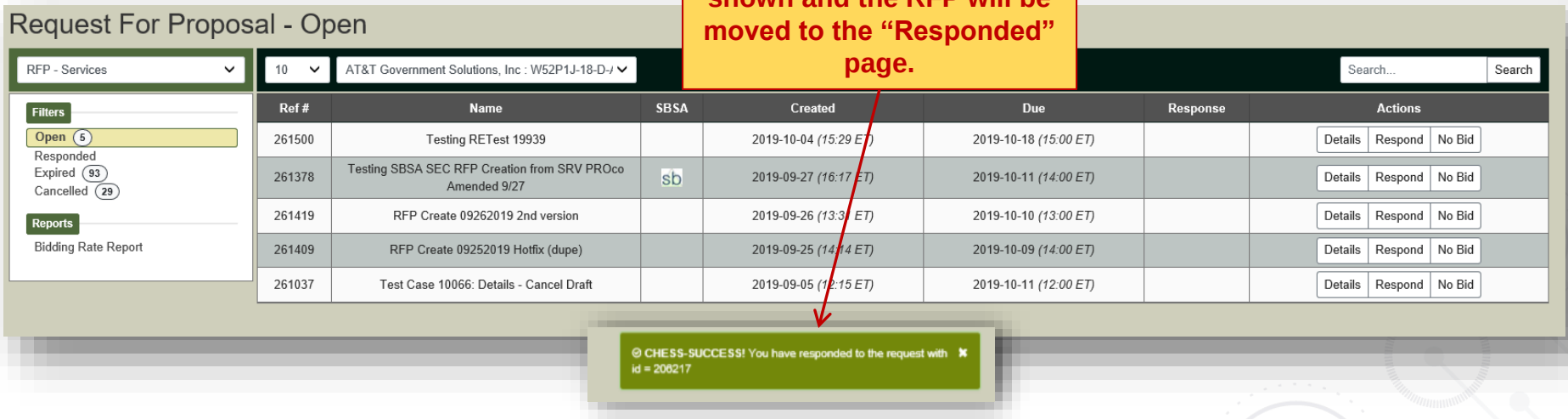
A Vendor uses an online form to submit a response, (bid or "no bid"), but will submit proposal documents to the Contracting Officer or Contract Specialist via the Attachments tool.

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

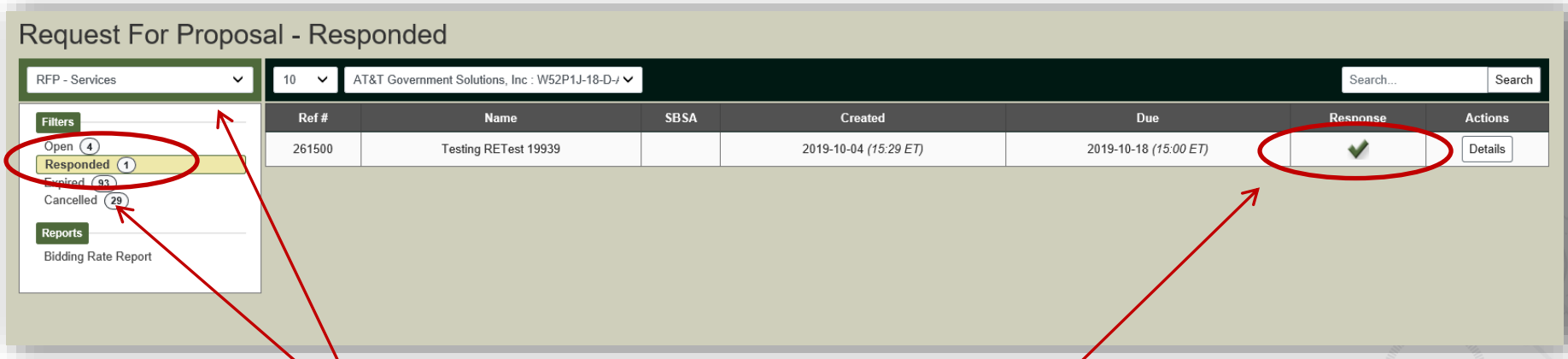
Vendor clicks "Submit" to respond to RFP

Vendor Responds to an RFP

Once a response is submitted the bar at the bottom of the page will indicate the response as shown and the RFP will be moved to the "Responded" page.



Vendor Views Responded RFPs

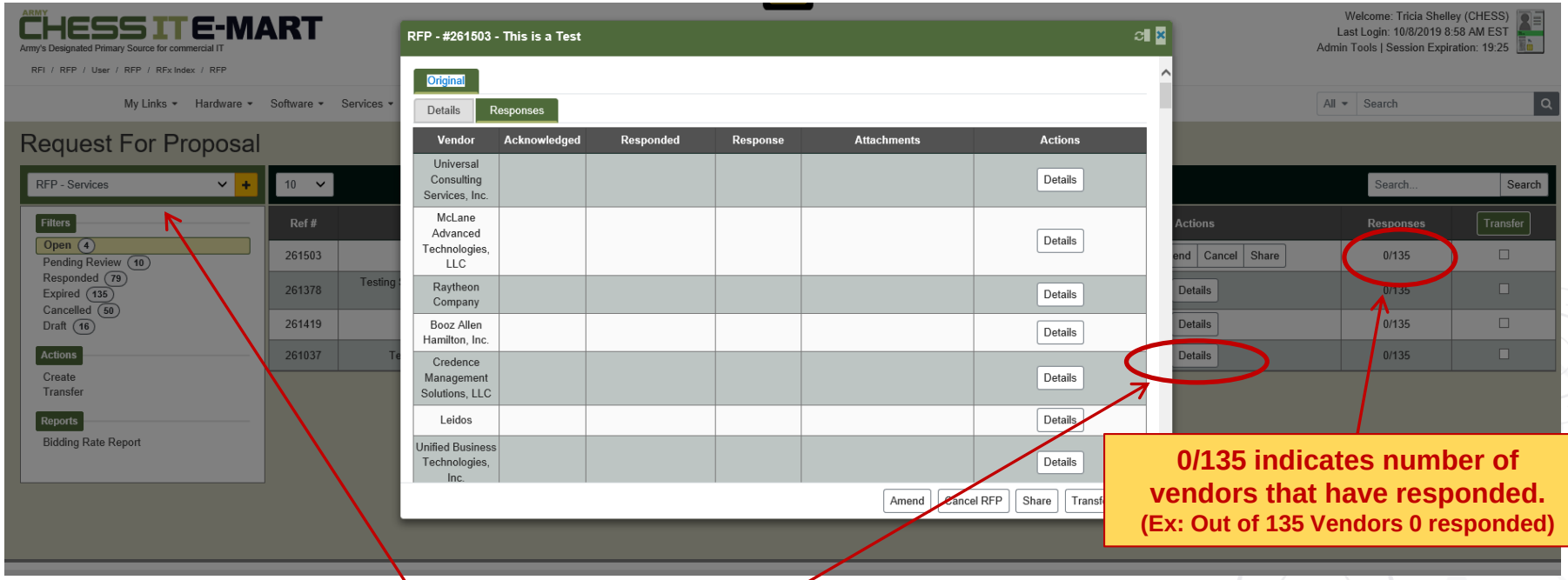


A Vendor needs to ensure they are on the "Responded" page selecting "RFP - Services" and clicking "Responded" in order to see a list of ALL responded requests.

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

Contracting Officer or Contract Specialist View of RFP Submissions

A Contracting Officer or Contract Specialist Reviews Bids



0/135 indicates number of vendors that have responded. (Ex: Out of 135 Vendors 0 responded)

Ensure you are on the "RFP - Services" Index page when reviewing responses. Expand the RFP you want to review by Clicking the "Details" tab then the "Responses" tab to see responses.

Questions

For information about the RFP Process, contact the

CHESS Customer Support Team

at armychess@mail.mil

Or toll free at: (888) 232-4405