ELECTRONIC BUSINESS WITH WEST VIRGINIA

West Virginia Purchasing Division
2022 Agency Purchasing Conference

OBJECTIVES IN THREE PARTS

- Electronic Business
  - What electronic options are available to state agencies? To vendors?
  - What are the benefits of electronic processing?
  - What is each audience's perspective?

- Expanding Your Vendor Base
  - Building a larger vendor base
  - Unlimited seats at the table and ways to entice vendors to sit
  - Why we are stronger as a whole?

- The Procurement Officer's Briefcase
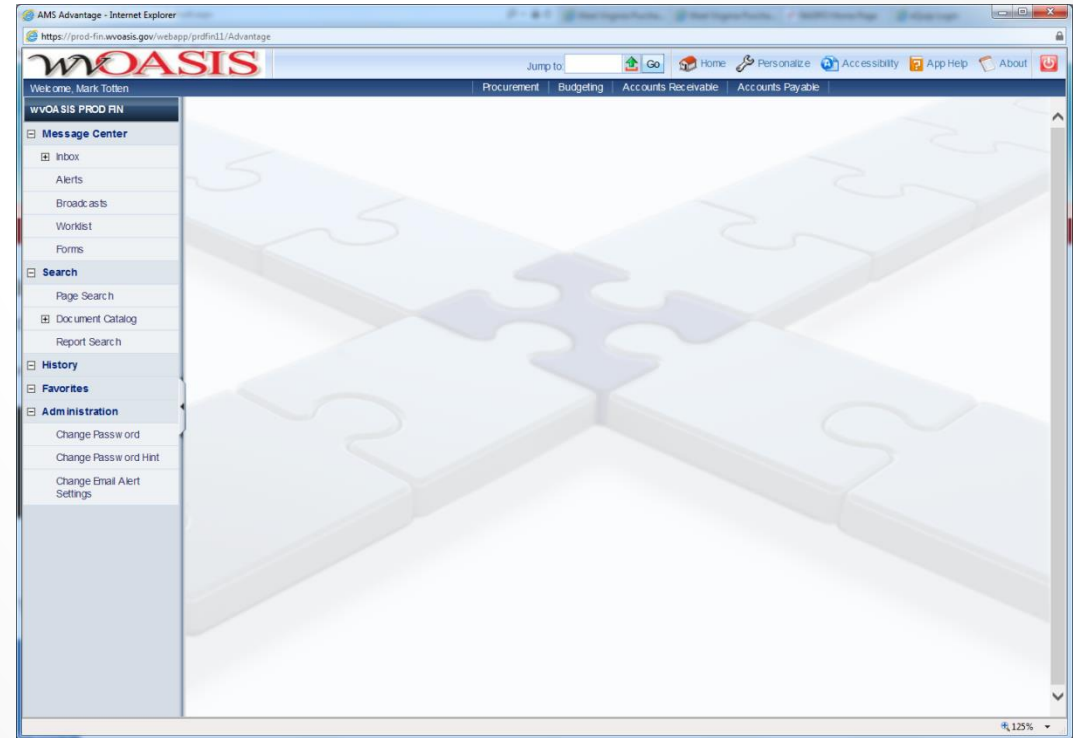 - Tools of the trade
  - Information to reference
  - Available reporting

I.

ELECTRONIC BUSINESS

WHAT DO WE CALL ELECTRONIC BUSINESS?

- Familiar components
  - wvOASIS
  - Vendor Self-Service
  - State agency websites such as WVPurchasing.gov
  - State agency intranet sites for employee-only reference
  - United Nations Standard Products and Services Code (UNSPSC)

- Connected school of thought regarding their relationship
  - The interconnect relationship between state agencies and the vendor communities
  - Each piece has a way to work together in order to benefit all state agencies

ELECTRONIC BUSINESS OPTIONS

- State agency portal (wvOASIS) and vendor portal (VSS) draw from synchronized data beginning at approximately 8:40 AM each business day

  - wvOASIS

    - How state agencies see electronic business power

  - Vendor Self-Service

    - How vendors see business opportunities with West Virginia

    - Portal for responding

    - Maintain customized company profile for interacting electronically with West Virginia

ELECTRONIC BUSINESS OPTIONS

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VENDOR SELF-SERVICE

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VSS WEST VIRGINIA PURCHASING BULLETIN

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ONLINE SOLICITATIONS IN VSS

- Public advertisement via the *West Virginia Purchasing Bulletin*

- Includes agency-delegated solicitations valued over $20,000

- Includes centralized solicitations
  - Vendors respond to West Virginia's opportunities from varying sources, dollar values, and procurement methods
    - Agency ("A")
    - Centralized ("C")
      - Electronic
      - Paper delivered to Bldg. 15
      - Fax
    - Multiple ways to respond reflect reality of doing business with West Virginia vendors

BENEFITS TO ELECTRONIC PROCUREMENT

- Distribution of information

- Ease of access to the same information

- Reach a wider audience with the same data

  - More vendors at the table can lead to more competition

  - Buying power of <u>all</u> state agencies harnessed together

- Power of the entire state comes together without significant time added to existing agency-level procurement tasks

THE OTHER SIDE'S PERSPECTIVE

- Shape your solicitation so vendors respond in a way that is consistent and clear

- Craft your solicitation so vendors can respond with as few attachments as possible

- Consider audience perspective
  - Technical ability
  - Patience

VSS SOLICITATION ATTACHMENTS

RESPONDING ONLINE

UPLOADING ATTACHMENTS

MAXIMIZING VENDOR SELF-SERVICE

- Not requirements, but suggestions
  - Simplify attachments, if possible; consider vendors' level of technical ability
    - Adobe Acrobat Pro
  - Research and add commodity codes to solicitation document
  - Consider vendor audience when choosing allowed response methods

- Balance technical organization with vendors' response capabilities; avoid restrictive technical requirements that might prohibit a vendor from participating

- State of West Virginia benefits from vendors' ability to understand and respond easily to solicitations

WHO IS WHO?

- wvOASIS VCUST vendor/customer table
  - State of West Virginia's centralized vendor database

- Have your vendors bid with the appropriate vendor/customer ID
  - Federal tax ID is legal thumbprint
    - "TIN" in wvOASIS
    - wvOASIS VCUST "Headquarters" vendor/customer account for that federal tax ID
    - Add additional Ordering and Payment addresses to VCUST Headquarters-designated record as needed in order to complete both sides of your transaction with vendor, even if multiple vendor/customer numbers exist
    - Discuss with vendor under what legal name your agency will be invoiced.
    - DBA field in VCUST can be utilized for additional legal names.

II.

EXPANDING YOUR VENDOR BASE

ASSEMBLING A VENDOR BASE

- VCC Document

- VCM Document

- WV-1

- Commodity code-based email alerts
  - VENDCOMM
  - Vendor email entered under Contact Information and NOT just Vendor User Information
  - Business Intelligence report utilization

- Vendor Self-Service

- Utilize Purchasing Division Vendor Registration Program materials
  - Purchasing Division statewide vendor webinars, written content

FIND VENDORS BY COMMODITY CODES ON FILE IN VCUST

- Business Intelligence > Advantage Financial > Procurement > **WV-FIN-VN-010 Vendors by Commodity**
  - Identify a larger solicitation audience by the commodity code(s) specified by vendor in their record.
    - wvOASIS > VCUST > Commodity
  - State agencies can run the above report in Business Intelligence by the UNSPSC commodity code relevant to their solicitation and export the data to Excel to further analyze vendor contact information.
  - Give your potential bidding audience a standard heads up directing them to a specific active solicitation.

WV-FIN-VN-010 VENDORS BY COMMODITY

WV-FIN-VN-010 VENDORS BY COMMODITY

- The data output by Business Intelligence can be saved as a Microsoft Excel file for sorting and review of vendor data.

- Other options for saving data exist, but Excel allows easy sorting and copying of potential vendor information.

WV-FIN-VN-010 VENDORS BY COMMODITY

- Exported spreadsheet conveniently centralizes entity name, wvOASIS v/c #, Ordering address, telephone number(s), and email address(es) on file for prospective vendors.
  - Some record duplication exists to display multiple contact persons.

SAMPLE VENDOR PACKET

- Vendor Registration Ad

- Vendor Procurement Guide

- WVPurchasing.gov Guide for Vendors

- Minority Business Information

- Vendor Webinar Flyer
  - When scheduled

- Statewide Seminar Flyer
  - When scheduled

- WV-1 Form
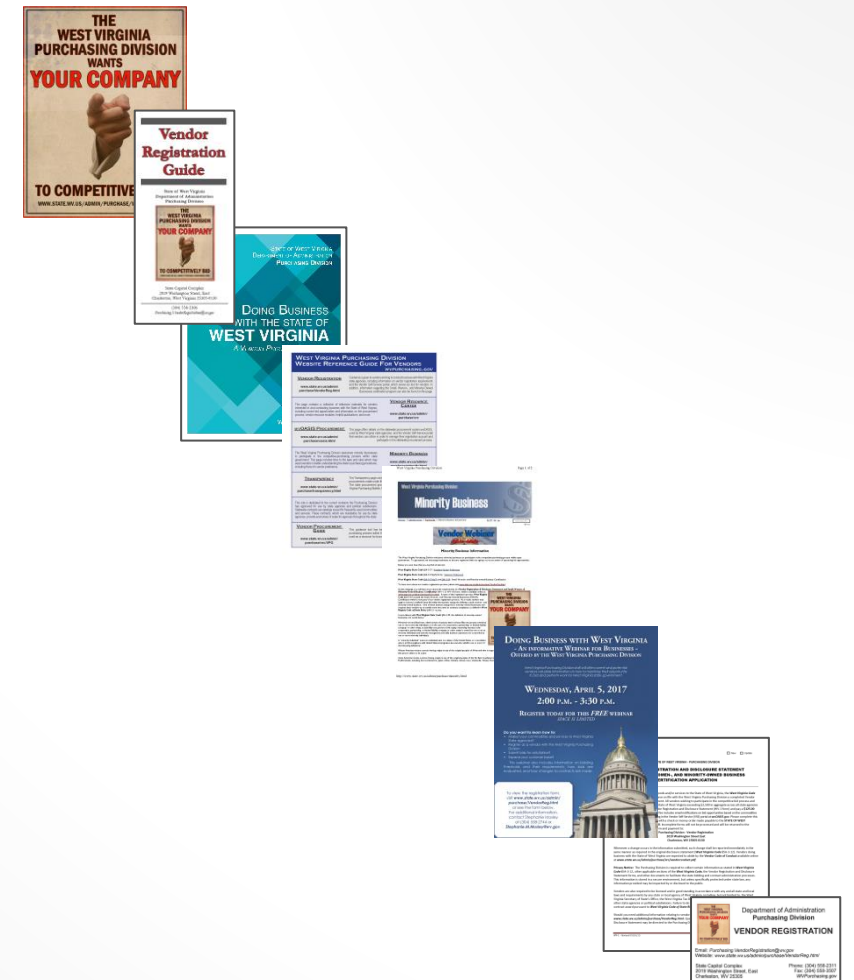
SWAM AS A DOORWAY

- ***West Virginia Code*** §5A-3-59 created Small, Women-, and Minority-Owned Businesses (SWAM) Certification Program in 2012

- Also created an opportunity for West Virginia vendors in states that reciprocate West Virginia's SWAM Certification

- Ability to compete out-of-state may draw West Virginia-based first-time bidders to State of West Virginia bid opportunities
  - Potential increase to vendor's business opportunities

- Creating account in Vendor Self-Service puts vendor in communication with WV state agency bidding opportunities

STRONGER AS A WHOLE

- State agencies' aggressive solicitation advertisement adds vendors to statewide database

- Increased person-to-person communication with vendors re-engages former participants in the competitive-bid process

- Vendors' utilization of *West Virginia Purchasing Bulletin* and commodity-code based email alerts brings more vendors to other agencies' solicitations

- Increased competition across all agencies lowers prices of commodities and services
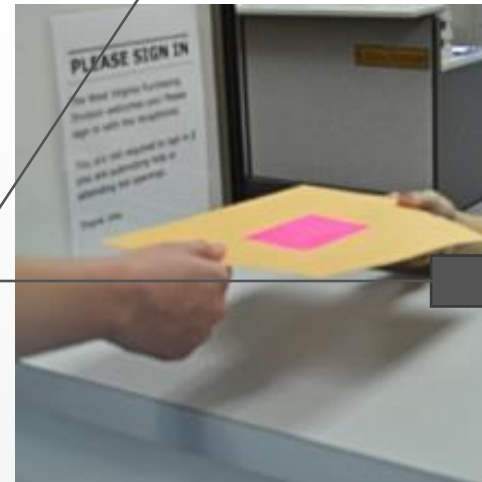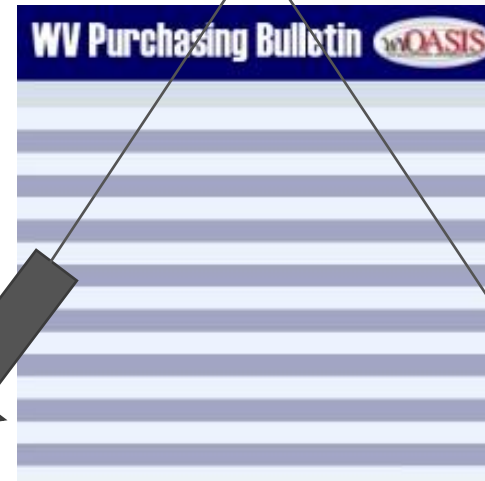
III.

THE PROCUREMENT OFFICER'S BRIEFCASE

TOOLS OF THE TRADE

- Website Reference Guide For Agencies
  - Covering state employee highlights of WVPurchasing.gov

- Intranet Reference Guide For Agencies
  - Covering state employee highlights of Purchasing Division intranet

- Website Reference Guide For Vendors
  - Covering vendor community's points of interest for WVPurchasing.gov

- Vendor Registration Guide for State Agencies

- Vendor/Customer Creation Document Guide

THE TRANSPARENCY TRIO

- Three pieces of the procurement cycle found under *Transparency* at WVPurchasing.gov:
  - **West Virginia Purchasing Bulletin**
    - What is the state seeking?
  - **Bids Received**
    - What offers were made?
  - **Notice of Award Report**
    - What vendors were successful?

VENDOR REGISTRATION AT WVPURCHASING.GOV

- Section of WVPurchasing.gov targeted toward vendor community

- Recommended as a first place of reference for vendors new to doing business with West Virginia

- Can save procurement employee time and explanation when building your vendor base

OASIS AT WVPURCHASING.GOV

- Evolving section of WVPurchasing.gov

- Includes information on:

- ERP project

- Benefits of creating a VSS account

- How to register with the Purchasing Division online

- Procurement terminology before and after wvOASIS implementation

VENDOR RESOURCE CENTER

AGENCY RESOURCE CENTER

- ARC section of WVPurchasing.gov includes helpful links for agencies

- Recommend familiarity with both WVPurchasing.gov and resources on intranet

- Information from multiple sources are the true scope of electronic procurement power

WVOASIS

- VCUST

- VENDCOMM

- VNREGEX
  - DEPT

- Business Intelligence
  - **WV-FIN-VN-010** Vendors by Commodity

PURCHASING DIVISION INTRANET

- Purchasing Applications (http://intranet.state.wv.us/admin/purchase/purapps.html)
  - *Requisition Tracking Report*
    - Future reporting ability enhanced with ReqTrak Classic 2.1
  - eArchive
    - Notices to Agency-Designated Procurement Officers
  - wvOASIS Tips for State Agency Employees
    - Procurement-focused references

- Vendor Registration for State Agency Employees

ReqTrak Classic

v. 2.1

KEY POINTS TO REMEMBER

- The full scope of doing business electronically with West Virginia encompasses a combination of systems, websites, and resources

- Using these tools together with respect to the entire state benefits both agencies and vendors
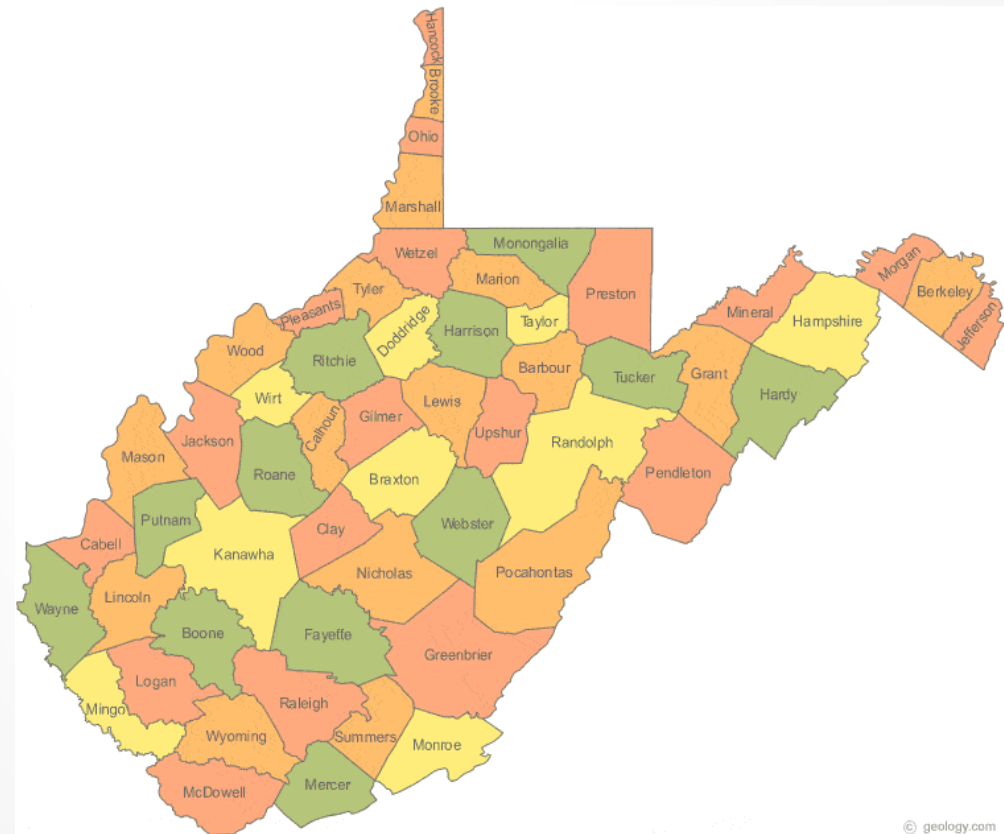
KEY POINTS TO REMEMBER

- Utilize commodity code-based notifications

- Know the information available at your disposal to aid your procurement processing

- Consider the responding vendor's perspective and technical ability
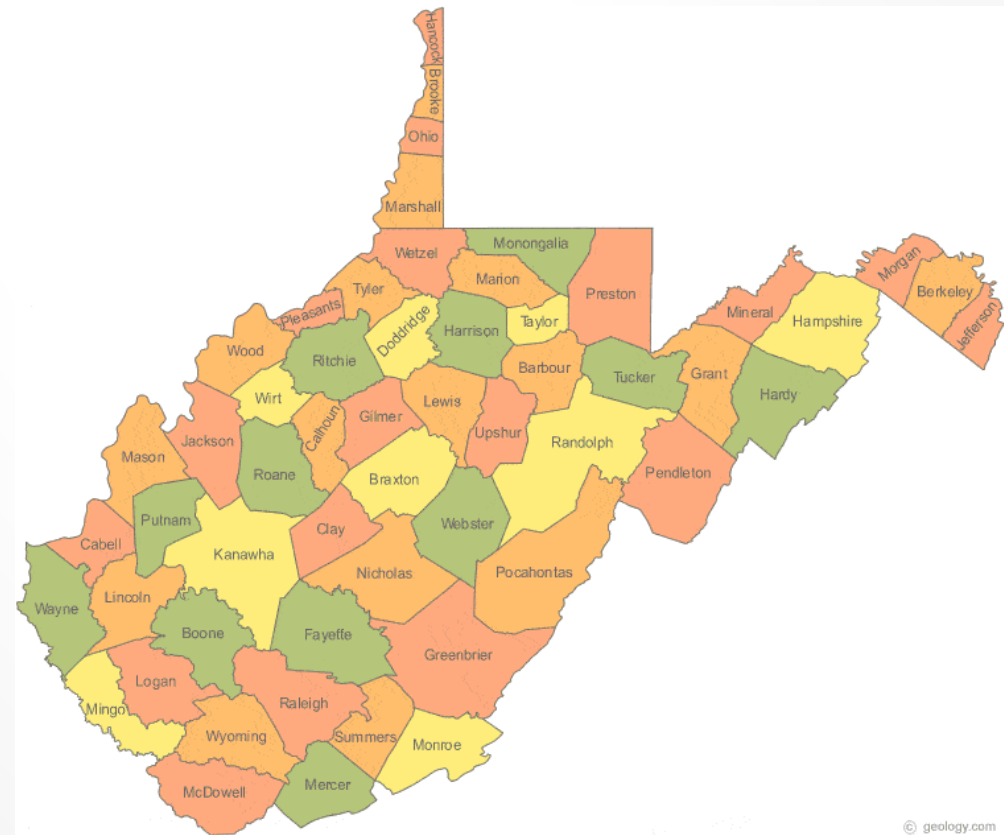
CONTACT INFORMATION

- Mark Totten
  - West Virginia Purchasing Division
    - WVPurchasing.gov / intranet.state.wv.us/admin/purchase
  - Mark.L.Totten@wv.gov

THE WEST VIRGINIA PURCHASING DIVISION WANTS YOUR COMPANY TO COMPETITIVELY BID

WWW.STATE.WV.US/ADMIN/PURCHASE/VENDORREG.HTML