



ESC III QUOTING SYSTEM TUTORIAL TRANSCRIPTION

MODULE 0 - Before You Start	
0	No Audio
MODULE 1 - Introduction	
1	Hello and welcome! This tutorial will help you learn how to create an ECS III request for quotes using the ECS III Quoting System.
1a	I'll give you lots of opportunities to learn by working hands-on with the system in a simulated environment. I'll let you know when and where to click. I'll also give you opportunities to practice on your own and test your own progress.
1b	Go through this at your own pace. If this is your first time using the ECSIII Quoting System, I suggest you go through this tutorial in sequence with me. You can also feel free to jump to any lesson by clicking the MAIN MENU button.
1c	Ready? Let's go!
2	Before you proceed through the tutorial or use the Quoting System, please make sure you've reviewed the ECS III home page and the resources available there. You'll get the most out of this tutorial if you are familiar with the ECS III guidelines and contract details. Please review them now before you continue. You can also access these documents at any time from the ECS III home page.
MODULE 2 - Logging in	
3	Let's log in to the Quoting System. When you explored the ECS home page, you probably noticed this link which you can click to access the Quoting System. Go ahead and click it now.
3a	When you're ready to use the live system, you'll click the FEDERAL CUSTOMERS INSTANT REGISTRATION button to request a user name and password. I already have a user name and password, so we'll use the LOGIN TO G-COMMERCE button. Go ahead and click it to continue with this lesson.
3b	I'll go ahead and enter the user name and password I received after I completed the instant registration.
3c	Click the LOGIN TO G-COMMERCE button to log us into the system.
4	Great! Here we are, on the first screen of the Quoting System. The first thing you'll see when you log in will be a list of your requests for quotes. The system automatically organizes them for you, so you can manage them easily. You'll continue to learn about this page and see some more examples as you work through this tutorial. Let's first talk about creating a basic request for quotes, or RFQ.

MODULE 3 - Creating a basic RFQ	
5	I just received an urgent message. I have to request quotes for some computer equipment immediately, and I'd like to you to help me. Trust me – even though you haven't done this before, creating a basic RFQ will be fast and easy!
5a	First, let's get to the screen for creating a new RFQ. See the menu bar up here? I'll click RFQs, up here, to open the RFQ's menu.
5b	Look at the RFQ menu options. We want to create a new RFQ. I bet you've already figured out which menu option that is. Go ahead and click it now.
6	Great! Clicking CREATE NEW RFQ takes us to page one of the process for creating a new RFQ.
6a	See the product types listed on the left? We need to select the correct one for this request. Let me tell you about my situation. I work in a busy office with several people who travel all the time. To help them be productive while on the road, I need to request a quote for 10 laptop computers, along with Microsoft Word and Excel.
6b	So, I need commercial, off-the-shelf equipment and software. Which Lot is that? Notice the Lots listed here under product type? Please click the correct product type for me. Here's a hint – commercial off-the-shelf is often abbreviated as COTS; that's C O T S. (spell out)
6c	This is a basic Lot 1 request, so that's all we have to do on this page. Click the CONTINUE button to go to the next screen in the process.
7	On page 2, we need to enter some details about the request so we can get an accurate quote.
7a	First we need to pick when this RFQ will close. I could type the date in this field.
7b	But I like to use the calendar function. Please click the CALENDAR button for me.
7c	I'm going to pick a date one month from today. I'll click the single "greater-than" (>) symbol...
7d	Then I'll click the day.
7e	And the day I picked automatically shows up in the Closing/Deadline Date field.
7f	Next, I'll type a brief description of my request in the Subject field...
7g	Then, I'll add more information about my request in the Details field. Please do not use the text I've entered here as your guideline for what to enter in your agency's RFQs. To find out what level of detail you must provide in your RFQs, be sure to consult your departmental guidelines or with those who approve your delivery orders.
8	We're almost done. Let me just quickly double-check everything we've done on this page.
8a	We have a valid deadline date...
8b	A subject that briefly describes the request...
8c	and details about my request.
8d	Okay – we're ready to submit this request. This will go out to every appropriate Lot 1 vendor. Go ahead

	and click the SUBMIT RFQ button for me.
9	Great! Thanks. This page lets me know that my RFQ has been submitted. You'll see a page like this each time you complete a procedure. Because we just submitted a request, this page gives us the RFQ number assigned automatically by the system. I'm going to be sure to write down the assigned RFQ number for future reference. Now then, let's get back to the main page where we can see all of my RFQs.
9a	Go ahead and click the button that says CLICK HERE.
9b	We're back where we began, and now the RFQ we just created is here in the list of Open/Responded RFQs.
10	I hope you felt that creating a basic RFQ in the ECS III Quoting System was as easy as I promised it would be. Let's review -- It's basically just three steps: select the Lot; provide the details, and submit.
MODULE 4 - Creating a Lot 6 RFQ	
11	Now that you know the basic steps for requesting a quote, you're going to help me create another RFQ. This time, I need to request a quote for standard, commercially available desktop computers (Lot 1) <i>and</i> support services for the computers (Lot 6).
12	The process for creating this type of RFQ is almost identical to a basic RFQ. There are two key differences: We'll need to provide an adequate description of the support services to be performed; and, the ECS III contract officer, or CO, must approve the RFQ before it is released to vendors.
13	All RFQs begin the same way... Think back to what we did to create a basic RFQ. Which menu did I use? Go ahead and click the menu you think we need to use to create a request for quotes.
13a	That's right! The RFQ's menu. Actually, most everything you'll ever do within the Quoting System is in this one menu. Now click the menu option to create a new RFQ.
13b	As I mentioned, this is a request for quotes for both desktop computers and support services. So, I will select Lot 1 and Lot 6 from the Product Types.
13c	By the way did you notice this link? When you're working in the system, if you forget what Lot 6 is, just click here to get instructions. There are similar information links throughout the system.
14	Before we continue, take a quick look at the email notification option. By default, you'll automatically receive three different messages about each RFQ you submit through the system. The first one arrives after the first vendor responds to the RFQ. The next one arrives two days prior to the closing date, and summarizes the vendor responses received to that point. The last notification arrives after the closing date and summarizes all responses to the RFQ.
15	I've selected Lot 1 for the desktop computers <i>and</i> Lot 6 for the support services I need for those computers. We're ready to proceed. Click the CONTINUE button, and we'll enter the details for this RFQ.
15a	I'll fill in the Deadline date, Subject, and Details. Notice that these are the same fields we completed for the basic RFQ.
15b	Now, because this RFQ includes Lot 6, I have to provide an explanation of the support services needed for the equipment. Notice this text in red tells me exactly what I need to do in this section.

15c	Notice these two choices. I have to indicate whether the items needing support services are part of this order, or if they were part of a previous order.
15d	The items are part of this order, so I'll select the first choice.
15e	Now I'll describe the items that require support.
15e	And here, I'll explain the support services needed.
15f	That's all there is to it. I just need to click the SUBMIT RFQ button.
15g	When I click SUBMIT RFQ, I get a message that reminds me of ECS Lot 6 procedures.
15h	I'll just click OK here.
15i	Which takes us to the NITAAC confirmation page? Remember, there was a page like this when we submitted the basic RFQ?
15j	I'll click the CLICK HERE button...
16	And now we're back to the main RFQ list. Here's the RFQ I just created in the list of pending Lot 6 RFQs. Remember – the ECS III CO has to approve this before vendors can respond. Once the CO releases the RFQ to the vendors, it will appear in the list of open RFQs.
MODULE 5 - Submitting an Exception to FOC	
17	If you need to request a quote from a specific vendor, you must submit an exception to the FOC. Now that you've seen step by step examples of creating RFQs, I'd like to show you just the key differences involved when creating this type of RFQ. The steps for creating the RFQ remain essentially the same, except that you must provide a reason for the exception, and your account management official, or AMO, and the NITAAC contracting officer, or CO, must approve the exception.
18	On the first page, be sure to select at least one LOT and then click the EXCEPTION TO FOC check box.
19	Once you mark the Exception to FOC check box, the screen will look like this. You must choose the type of exception. If you select Logical Follow-on, you will be prompted to enter a prior order number, with the same vendor, and it must be an order that has been placed under the ECS III contract or else the RFQ cannot be submitted. Once you choose the type of exception, select a vendor from the drop down list.
20	On the second page, complete the date, subject, and details as you normally would. Then, provide a statement explaining why you are requesting an Exception to the FOC. If you have the authority to approve the exception to FOC, check the box at the bottom of the page. If you do not have the authority, leave the box unchecked and proceed; you will be asked on the next screen to provide information on who does have that authority, so the RFQ can be routed to that person.
21	When you continue, the system will guide you through a series of steps to select your account management official and submit the RFQ to him or her. One feature of the ECS III system is that it will automatically send an email to your AMO that includes information about the RFQ and instructions for proceeding with the approval.
22	The RFQ will appear in the list of RFQs pending AMO approval. Once approved and released to the vendor you selected, the RFQ will appear in the open RFQ list.
MODULE 6 - Attaching a File	
23	Here's a time saver that I think you'll really like. If the details of your RFQ are already documented in a file, such as a Word document or Excel spreadsheet, you can attach that file to your RFQ.
24	Here's a basic RFQ I've been working on. I need to attach the Word document that has the details.

	Where do you think I need to click to attach a file? Which link, button or field is it? Click it now.
25	That's right! This serves as another example of how easy it is to find your way around in the ECS III system. You simply need to follow the instructions that the system provides. The rest of the process for attaching a document to a request for quotes is just as easy as attaching a file to an email message. Browse your files, attach the file, and click DONE. Just remember – you may attach only one file.
26	In the RFQ list, a document icon appears next to any RFQs that include an attachment.
MODULE 7 - Placing an Order (Converting RFQs to Delivery Orders)	
27	Great news! Vendors have responded to one of my RFQs and it's time to review their quotes and place the order. Take a look at this with me so you'll know what to do when vendors respond to your RFQs.
28	First, I need to review vendor responses so I can identify the best value quote. I simply click the RFQ from the list of open RFQs.
28a	Here are the vendor responses to my RFQ. On this page I can see a summary of all responses. I can even use the PRINT THIS button to print it for my records – probably a good idea. Right now, though, I'd like to view the details of the least expensive quote. Where do I click to do that? Go ahead and click it now.
28b	That's right! Here are the details of the vendor quote. I can check all the details of the quote, print the information for my records, and most importantly, convert this quote into an order.
28c	I need to enter my Agency Order Number, name, and payment method.
28d	Now I'm ready to convert this quote into an order. What button do I need to click? Click it now.
29	Great job! That was easy, wasn't it? When you're ready to convert a quote into an order, just keep these three basic steps in mind: view the vendor quote details; enter payment information; and, click the CONVERT TO ORDER button.
30	Before I have you do a quick knowledge check, and wrap up this tutorial, I wanted to be sure to make you aware of the help feature available on every screen in the system. If you're ever in doubt of what to do on a particular screen, just click the HELP icon. It's the one up in the right hand corner that looks like a little book. No need to memorize anything – just remember to read the screen and use the help feature. This system will guide you through the process.
MODULE 8 - Check Your Knowledge	
31	You're almost done! It's time to check your knowledge with a quick review quiz. Relax and breathe – this is just a way for you to check your own progress - no scoring involved!
32	Sally needs to get a quote from one specific vendor. What must she do? Select the best answer.
33	Tim is in the middle of creating this RFQ and he would like to attach a document that has all the details. Where should he click?
34	Anthony is creating a request for quotes for commercial, off the shelf equipment, telecommunications equipment and support services. What Lots should he select? Choose all that apply. Here's a hint: information about each Lot is available in the ECS Guidelines document.
35	You're doing great! Now, try this one. Throughout the tutorial, you saw examples of the main RFQ list where you see open and pending RFQs. You can jump to this page at any time using the RFQ menu.

	Here's a picture of the RFQ menu. Which menu choice do you think you should click to jump to the RFQ list?
36	One more bonus question so you can see for yourself how easy it is to find your way around in the system. Here's a picture of the RFQ menu again. Which option do you think you should click to change the deadline date for a RFQ?
37	Congratulations! You've completed this tutorial. Remember, you can come back at any time and jump into any part – just use the Main Menu. Also, I've gathered a few more tips and tricks for you and put them in a separate document. Click the button below to view and print it. Thank you for joining me – I hope to see you again soon!