



Services Procurement Self-Service

	<p>Manage the order in which your fields are organized during Statement of Work creation. Upload nomenclature already defined. Create and manage surveys for closed milestones or projects</p>
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Please note that depending on your Beeline Platform settings, this feature may, or may not, be turned on. Reach out to your Beeline Representative to adjust settings.

How to Navigate to Services Procurement Self-Service via Self-Service:

1. Log in to the Beeline Platform using your *username* and *password*. Your Home page appears.
2. Click the **My Preferences** icon  at the top right of your page in the Header Menu.
3. Hover over the **VMS Settings** menu item and click **Statement of Work**.
4. Click **Services Procurement Self-Service** from the list of available Statement of Work Self-Service features, to be taken to the Services Procurement Administration (Self-Service) screen and note that the **Services Procurement Templates** will appear since it is the top item of the list of Service Procurement Administration options from the column to the left of the screen.
5. Users can click on a category from the column displayed to the left of the screen and navigate to the following pages:
 - **Services Procurement Templates:** displays all active or inactive templates across all project agreement types and allows you to Manage Default Content.
 - **General Info:** Where you can re-arrange the fields on the template. Provides easy “up” and “down” arrows to adjust the display order of the data fields and ensures “parent/child” hierarchy relationships are maintained. Arrows are not available for fields that are members of cascading groups to preserve their relative order within the section, but other fields can be moved around and between these fields.
 - **Library Terms:** Lets you create and store generic verbiage frequently used in your SOWs. Allows program offices to mandate content for a particular SOW template and eliminates duplicate data entry and saves time when creating SOWs.
 - **Create Survey Template:** create surveys for closed milestones or projects.
 - **Manage Survey Templates:** This is where any surveys that are set-up will display. They can be deleted or copied via the **Survey Actions** drop-down.
 - **Surveys to Review:** displays surveys that are available for review (if any).

How to Manage Default Content via the Services Procurement Templates Screen:

Complete steps 1-4 above.

5. From the Services Procurement Templates screen, click **Manage Default Content** to preview the SOW Template as it appears for the end-user.
6. Populate fields within the General Information, vendors, Contributors, Terms, and default Financial sections, with default content that you wish to be displayed without the user having to select it for themselves when they create a SOW. *(I.e., If the Owner of this type of SOW is always going to be the same, you can populate that field with the owner's name when managing the default content. It will default to that person when an end-user is creating a SOW from that template now. Any fields left blank will not have default content populate when creating that type of SOW.)*
7. Click **Save** after each page.

How to use the Library Terms:

Complete steps 1-4 from the “How to Navigate to Services Procurement Self-Service” section above.

5. From the Services Procurement Administration (Self-Service) screen, click **Library Terms** from the column to the left to be taken to the **Library Terms** screen.
6. Click the **Import Library Terms** hyperlink.
7. Name the import in the **Import Name** field.
8. Select SOW or Competitive bid from the **Project Agreement Type** drop-down field.
9. Click on the **Download Template** link.
10. Fill out the Excel document with the Library Term information and Save to your computer.
11. Click **Select** and upload your Excel document.
12. Click **Next** (valid and invalid entries will be displayed; the i-bubble will provide additional information regarding invalid entries).
13. Click **Back** if any adjustments are needed.
14. Click **Finish** to add valid entries to your Terms Library.

How to Create a Survey Template:

Complete steps 1-4 from the “How to Navigate to Services Procurement Self-Service” section above.

5. From the Services Procurement Administration (Self-Service) screen, click **Create Survey Template** from the column to the left to be taken to the **Create or Edit Template** screen.
6. Fill out the following fields from the Information section:
 - **Name:** The name of the survey you create
 - **Description:** Add a description to help differentiate this survey from others.
 - **Is Active (checkbox):** leave checked if you want the survey to be visible.
 - **Action to Send Survey:** Select **Close Milestone** to have the survey send after a milestone is closed or select **Close Project** to have the survey send after a project is closed.
 - **Reviewer:** Select who you would like to review the survey.
 - **Recipients:** Select who will receive the survey (Hold Ctrl or Shift to select multiple)
 - **Project types:** Select what project types of the survey will send out for (Hold Ctrl or Shift to select multiple)
7. Click **Next** to navigate to the Questions Settings tab. This section allows you to provide configuration options before you add/modify questions that your Recipients will answer. Choose from the following:
 - **Allocate Points:** Assign points to each of your questions as they are created.
 - **Allow Knockout Questions:** A knockout question is a question if answered incorrectly, by the recipient, automatically marks the questionnaire as failed.
8. Click **Next** to navigate to the Questions tab. This section allows you to provide configuration options. This section allows you to add/modify questions that your Recipients will answer. To begin, click on Add Question and then choose a question type. Your questionnaire can have multiple pages (indicated by the numbers across the top of the template) and each page can have multiple questions. Please note that the questionnaire must have at least one page with one question for the template to be saved.
9. After completing questions, Click **Save**.