



U.S. General Services Administration

Federal Acquisition Service

Market Analysis

GSA Training Module Developed for IWAC RBA Extension Project

Market Analysis Training Module Overview

Description: This training module will take you step-by-step through the Market Analysis document in the Regional Business Application (RBA) IT-Solutions Shop (ITSS) component.

Navigation: If the tutorial opens up in your web browser, simply click your mouse or your space bar to advance to the next slide. Use the “Backspace” key to go back. If the tutorial opens in the PowerPoint application, click on “F5” to view the tutorial. Use the spacebar or click your mouse to advance to the next slide. To go back, click on the “Backspace” key.

Market Analysis Glossary

Term	Definition
Market Analysis	The process of selecting a winning vendor once the RFQ has been closed.
Client Acceptance Required	Option on Market Analysis to require client approval of GSA recommended Quote.
Contractor Bid Table	An excel sheet exportable from the Market Analysis document showing information from Contractor bids at the task item level.
Dollars Subform	The Dollars subform has fields for capturing costs, fees, totals, and other money-related values. The Dollars subform needs to be populated and submitted prior to certification of funds.

Market Analysis Privileges

User Role Action	Create	Edit	View
GSA Users	✓*	✓	✓
Clients		✓**	✓
Contractors			

*Cannot create Market Analysis if RFQ was an RFI from e-Buy.

**Clients can edit if Market Analysis status is 'Pending Client Acceptance' otherwise they have read-only access.

Select a View:

<<-- View Orders --> <<-- View Inactive Orders --> <<-- View Action Items --> <<-- View Support Information -->

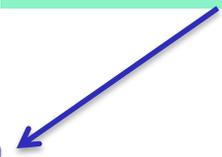
Go to a Specific View Item: [Create New Order](#)

Orders - Entire Package

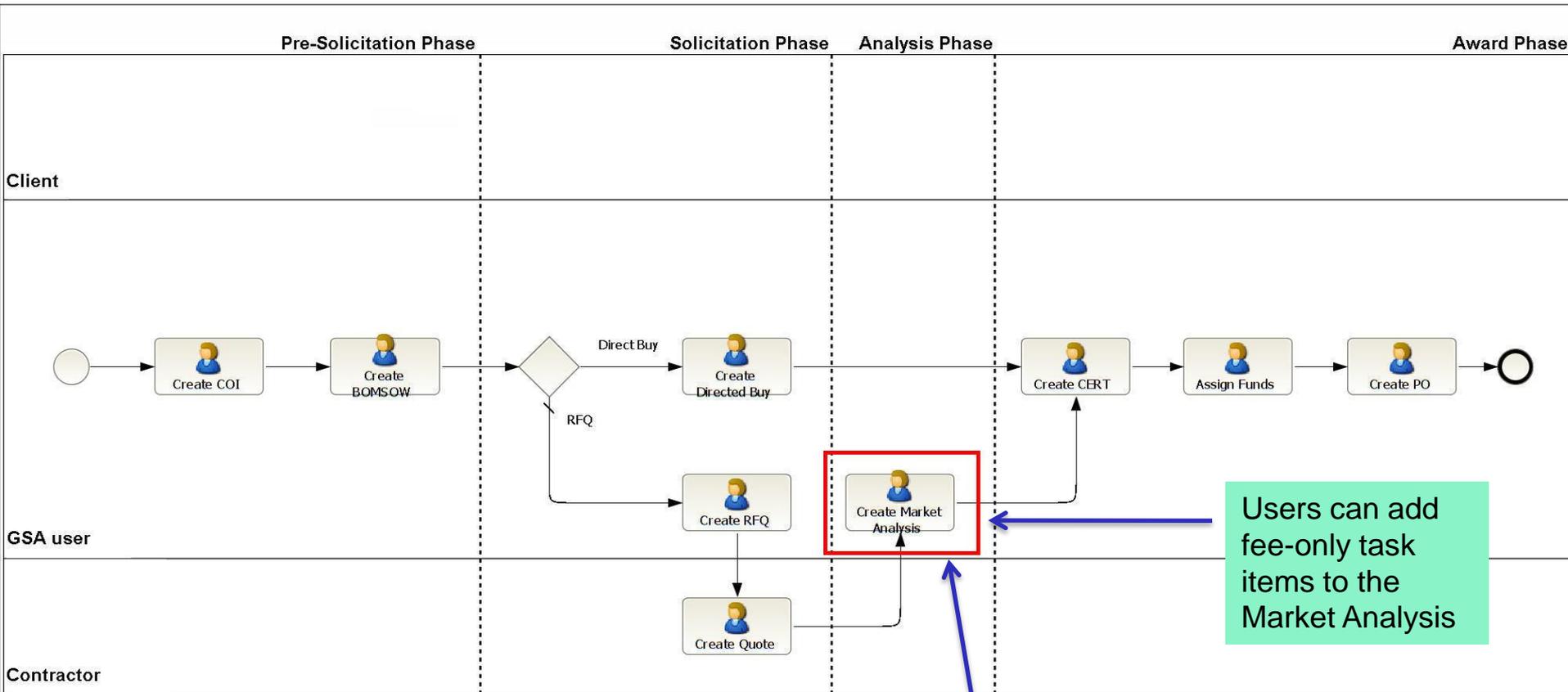
Next -> |

- ▼ Order Package
 - ▼ ID31120060-COI Sarah Client (Organization Name) AWARDED>>Furniture procurement
 - 00 Chronology
 - ▶ 01 Electronic Contract File (ECF)
 - ▼ 01 BOM/SOW ID31120060 - 000 Amendment 00 AWARDED
 - ▼ RFQ Modification 000 Version 00 Amendment 00 GSA APPROVED
 - Quote Ver 00 Rev 00 for Steve Contractor (IT INDUSTRY PARTNERS) Cnt# << Open Market >>, BID=\$200,000.00
 - Quote Ver 00 Rev 00 for Mary Contractor (CONTRACTOR COMPANY) Cnt# << Open Market >>, BID=\$235,000.00
 - *Market Analysis Version 00 - Quote Selected: Steve Contractor - IT INDUSTRY PARTNERS (<< Open Market >>), \$193,100.00
 - >Certification of Funds - Funds Available (Francine FM)
 - >Form 300 - Awarded on 2012-02-09
 - >FPDS-NG Form - ID31120060-000

Click on the Market Analysis link in the Order Package View to open an existing Market Analysis in view mode

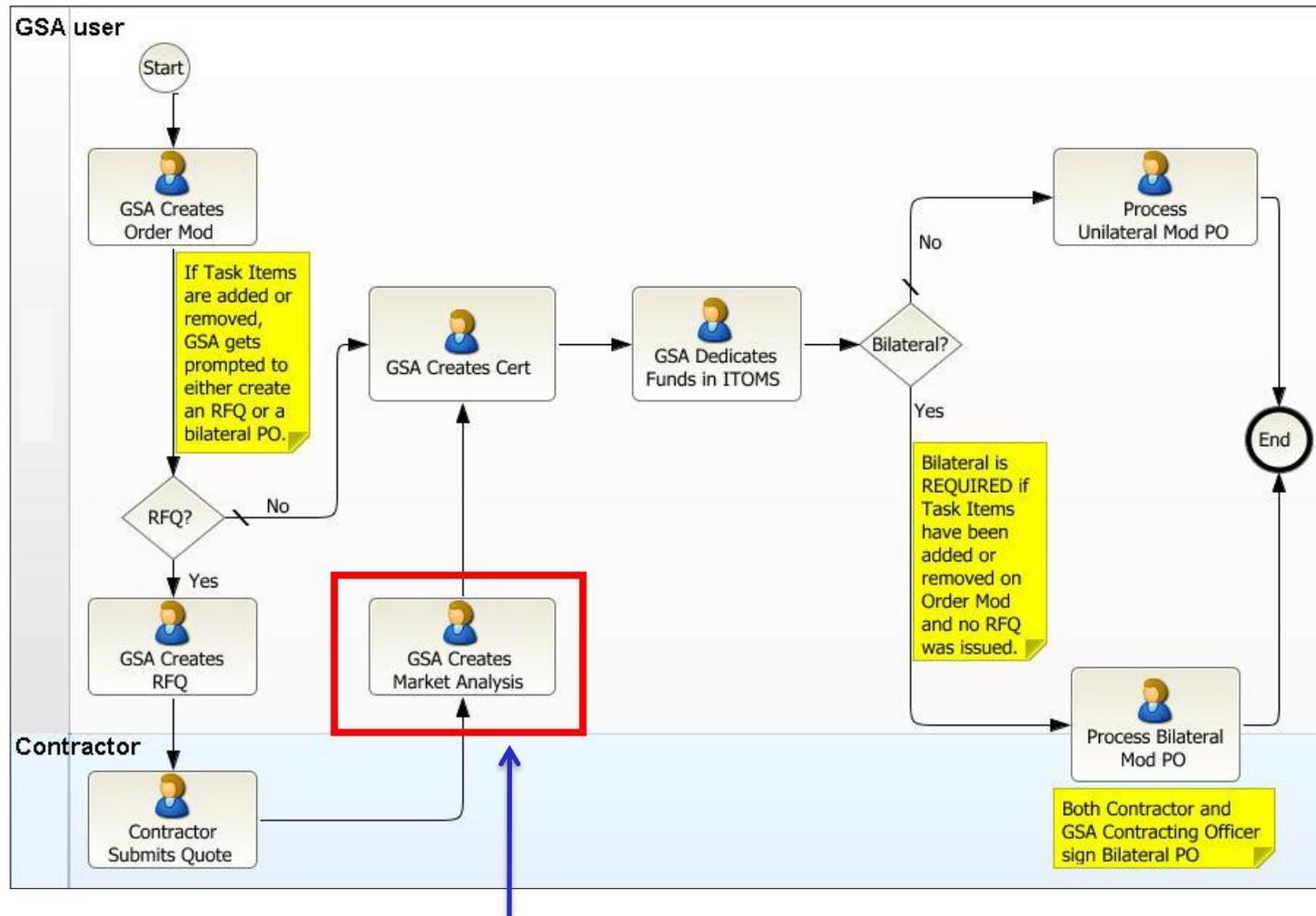


Within the Pre-Award Workflow Context



A *non-draft* Market Analysis contains a Dollars subform. A *Dollars subform* is also displayed on the Directed Buy and Order Modification forms. The Dollars subform has fields for capturing costs, fees, totals, and money-related values. The Dollars subform needs to be populated and submitted prior to certification of funds.

Within the Post-Award Workflow Context



If a Market Analysis is created on an Order Mod then the amounts entered on the Market Analysis Dollars Subform are the amounts sent to the CERT for funding (the Order Mod values are only used if the CERT is created directly from the Order Mod)

Request for Quote

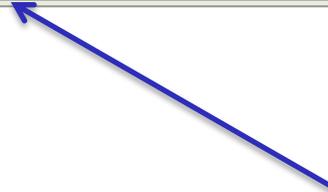
Create
Faxed Quote

Market Analysis

Amend
Solicitation

Go To Order
Package

Submitted By: Christopher CSR on 02/09/2012
Order ID: ID31120060, Mod 000, Version 00, Amendment 00
Publish in e-Buy: No
Client Rep: Sarah Client (Organization Name)
Status: **Closed**



Click on the Market Analysis button on the RFQ form to generate a new Market Analysis in draft mode

Market Analysis
[Close Without Saving](#)

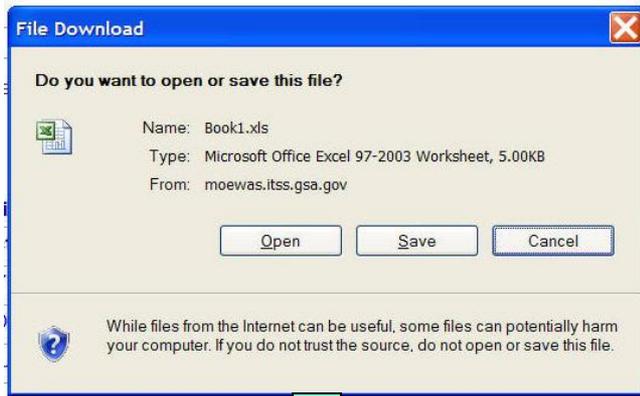
Submitted By: Christopher CSR at 02/09/2012
Order ID: ID31120060 **Mod:** 000 **Version:** 00
ActNumber:
Status: **Draft**

The Contractor Bid Table shows a summary of all total quote amounts. Click on the *Export Bids at Task Item Level* button to generate an Excel spreadsheet with contractor Quote data.

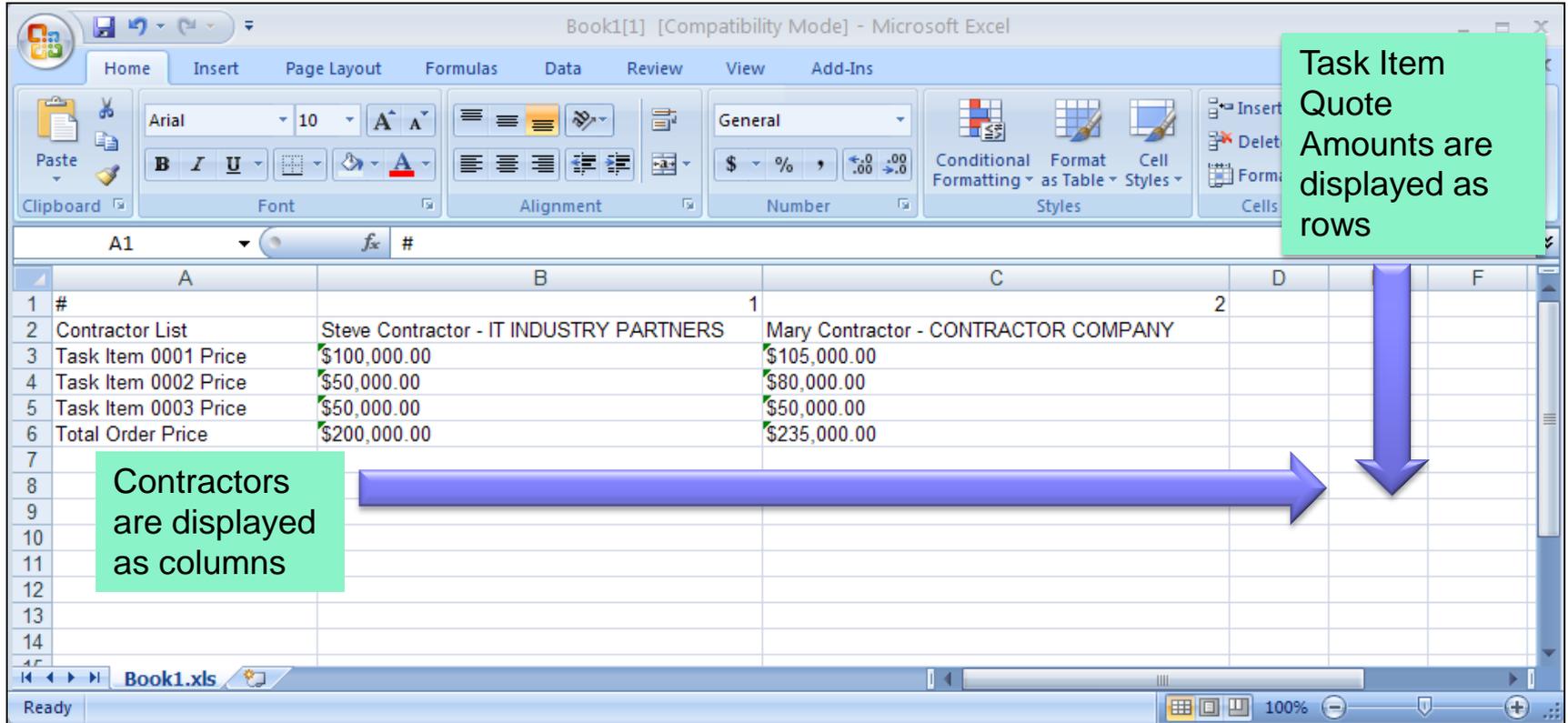
 All Fields marked with  are required.

[Export Bids at Task Item Level](#)
CONTRACTOR BID TABLE (ranked list by price)

	Contractor List	Total Order Price	Submitted Date	All Req Met	Delivery Dates Met
1	Steve Contractor - IT INDUSTRY PARTNERS (<< Open Market >>)	\$200,000.00	02/09/2012	Y	Y
2	Mary Contractor - CONTRACTOR COMPANY (<< Open Market >>)	\$235,000.00	02/09/2012	Y	Y



Open the spreadsheet to view all Contractor quote data at the task item level



▼ GSA Analysis

Include all information to justify GSA's contractor selection to the client.

File Attachments:



Select Recommended Contractor Quote:

Fair Opportunity Properly Conducted:

 Yes No

GSA Comments:

▶ Edit History

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Select one of the following options for the winning contractor list:

1. Select a winning contractor from the submitted quotes.
2. Save the Market Analysis as a draft
3. Select "No Contractor Selected" to reject the Market Analysis, RFQ and all Quotes

Indicate whether fair opportunity was properly conducted. This is for reporting purposes.

By selecting a contractor and then clicking the *Submit* button, the Market Analysis form will re-load to be in an *In-Process* status

Market Analysis

Close Without Saving

Submitted By: Christopher CSR at 02/09/2012
 Order ID: ID31120060 Mod: 000 Version: 00
 ActNumber:
 Status: **In-Process**

All Fields marked with are required.

Contract Number submitted by contractor.

GSA Analysis

Include all information to justify GSA's contractor selection to the client.

File Attachments:

Selected Contractor: Steve Contractor

Contract Number: << Open Market >>

PIID Code: A - Agreements (including basic agreements, BOAs and BPAs)

Fiscal Year of Award: 2012

PIID: [To Be Generated]

Contract Type: Fixed Price

Fair Opportunity Properly Conducted: Yes No

Number of Bids:

Current Project Value: (POP From Date 02/15/2012 To

Select a PIID Code, Fiscal Year of Award, and Contract Type

The system will automatically generate a standardized Procurement Instrument Identification Number (PIID) upon submission of the Market Analysis

Market Analysis

Close Without Saving

Submitted By: Christopher CSR at 02/09/2012
 Order ID: ID31120060 Mod: 000 Version: 00
 ActNumber:
 Status: **In-Process**

All Fields marked with are required.

File attachments have a maximum size limit of 50 MB per file.
 File attachments must have a unique filename within the entire order.

GSA Analysis

Include all information to justify GSA's contractor selection to the client.

File Attachments:



Selected Contractor: Steve Contractor

Contract Number: << Open Market >>

PIID Code: A - Agreements (including basic agreements, BOAs and BPAs)

Fiscal Year of Award: 2012

PIID: [To Be Generated]

Contract Type: Fixed Price

Fair Opportunity Properly Conducted: Yes No

Number of Bids:

Current Project Value: (POP From Date 02/15/2012 To 0)

If indicated that Fair Opportunity was properly conducted then a Number of Bids received field will be displayed and required.

If indicated that Fair Opportunity was not conducted then Exception and Justification fields will be displayed and required.

Incremental Funding

Will this order use Incremental Funds? Yes No

Grand Total for Incremental Funding: \$175,000.00

Total Contractor Proposed Amount: \$200,000.00

Fee Calculations

The following fields are used for entire Project order amounts. Task Items marked "Active" will require Funding.

Add a Task Item

Apply a single surcharge rate across all task items? Yes No

Active	Fiscal Task Type	Item No.	Description	Contractor Proposed Amount	Prior Cost to GSA Increase or Decrease	New Task Item Amount	Type of Charge	Fee Amount	Cost to GSA
<input checked="" type="checkbox"/>	COM	0001	Furniture	\$100,000.00	\$0.00 \$80,000.00	\$80,000.00	Surcharge	12% \$9,600.00	\$80,000.00
<input checked="" type="checkbox"/>	COM	0002	Seating	\$50,000.00	\$0.00 \$50,000.00	\$50,000.00	Surcharge	12% \$6,000.00	\$50,000.00
<input checked="" type="checkbox"/>	FFP	0003	Installation	\$50,000.00	\$0.00 \$45,000.00	\$45,000.00	Flat Fee	\$2,500.00	\$45,000.00

Click the button to calculate the total amounts

Calculate

The Dollars Subform's various task item attributes such as:

- Active
- New Task Item Amount
- Type of Charge

are editable on an in-process Market Analysis

▼ **ORDER TOTALS**

Prior Order Cost to GSA:	\$0.00	Prior Order Cost to Client:	\$0.00
Increase/Decrease Order Cost to GSA:	\$175,000.00	Increase/Decrease Order Cost to Client:	\$193,100.00
Total Order Cost to GSA:	\$175,000.00	Total Order Cost to Client:	\$193,100.00

Client Acceptance Required? Client Acceptance Required
 Client Acceptance Not Required

GSA Comments:

▶ **Edit History**

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Indicate whether the Market Analysis requires approval from the client

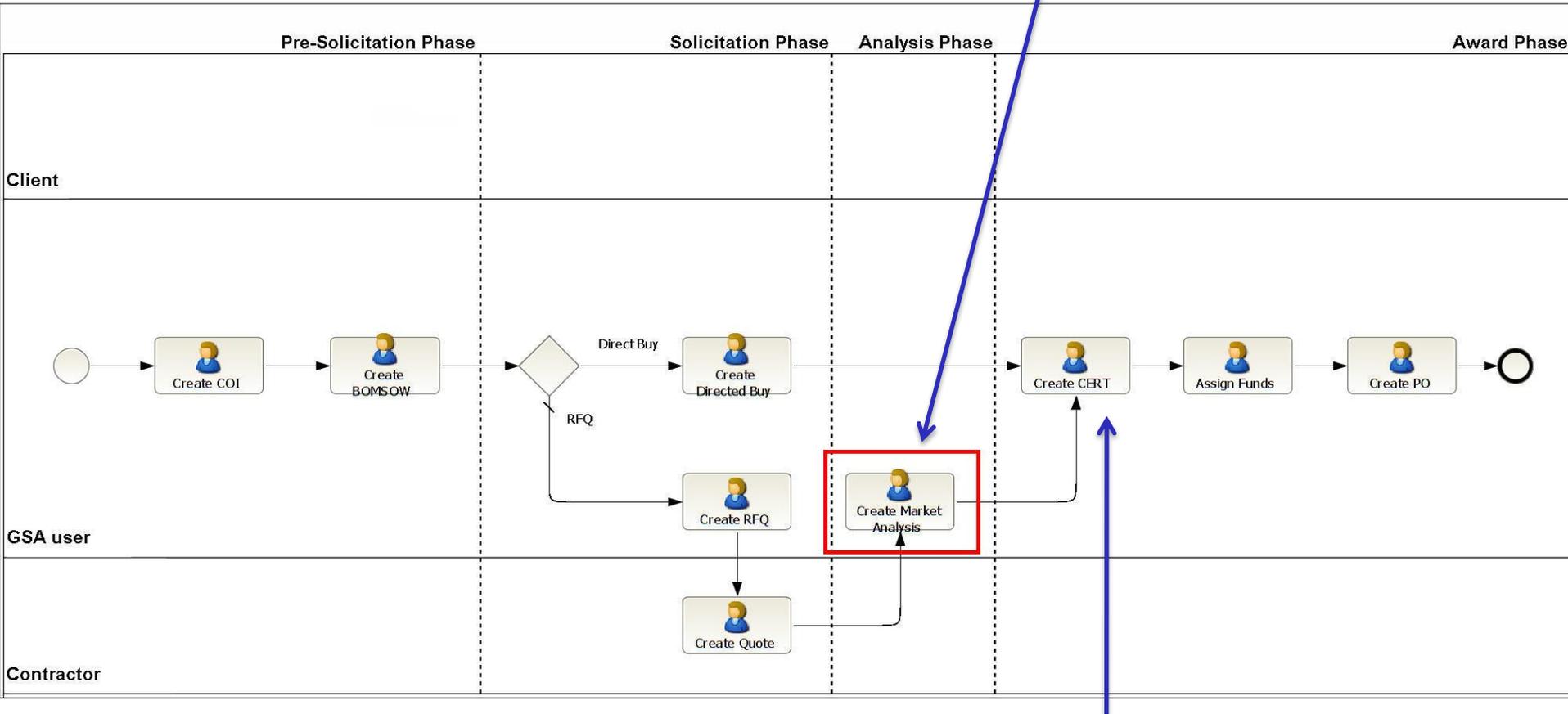
Click *Submit* to save the Market Analysis values and proceed with either MA approvals or creation of the Certification of Funds document

Market Analysis Status Glossary

Status	Definition
Draft	Market Analysis has been created but no winning quote has been selected.
In-Process	A winning quote has been selected, but the GSA Fees and Client Acceptance still need to be specified.
Quote Selected	A winning quote has been selected, GSA Fees have been calculated, and Client Acceptance/Approving Official Acceptance was not required. Order is ready for the Certification of Funds or the Market Analysis can be rejected.
Quotes Rejected	'No Contractor Selected' option has been selected.
GSA Recommendation	A winning quote has been selected, GSA Fees have been specified, and Approving Official Acceptance and/or Client Acceptance options have been specified.
Approving Official Accepted	A winning quote has been selected, GSA Fees have been specified, and Approving Official acceptance was required and subsequently approved.
Recommendation Accepted	A winning quote has been selected, GSA Fees have been specified, and Client Acceptance was required. Client (or GSA Rep) accepted the recommendation. The order leg is ready for the Certification of Funds, or Market Analysis can be rejected.
Recommendation Rejected	A winning quote has been selected, GSA Fees have been specified, and Approving Official acceptance and/or Client Acceptance was required. Either Approving Official or the Client (or the GSA rep) rejected recommendation. If the Approving Official rejected, then a new Market Analysis needs to be created from the RFQ to proceed with the order. If the Client rejected, then a new Request for Quote is necessary since another Market Analysis can no longer be created from the same RFQ.
Rejected	Market Analysis has been soft-rejected via the 'Reject Mkt Analysis' button on the Market Analysis. The order was ready for Certification of Funds prior to Rejection. A new Market Analysis can be created from the existing RFQ.

Next Steps...

If the Market Analysis requires approval (by either GSA Approving Official or Client) then it must be approved before the user can create a CERT



All task item details (item no., description, pop/delivery date, and active flag) are locked-down as non-editable when a CERT is created. Only active task items go on to the CERT for funding.

Federal Acquisition Service

Questions & Support

- For questions regarding AAS Policy please contact randy.matlack@gsa.gov or robert.niewood@gsa.gov
- For questions regarding the RBA Market Analysis training module please contact RBA Technical Support:
 - Phone: (877) 472-4877
 - Email: AASBS.helpdesk@gsa.gov

