

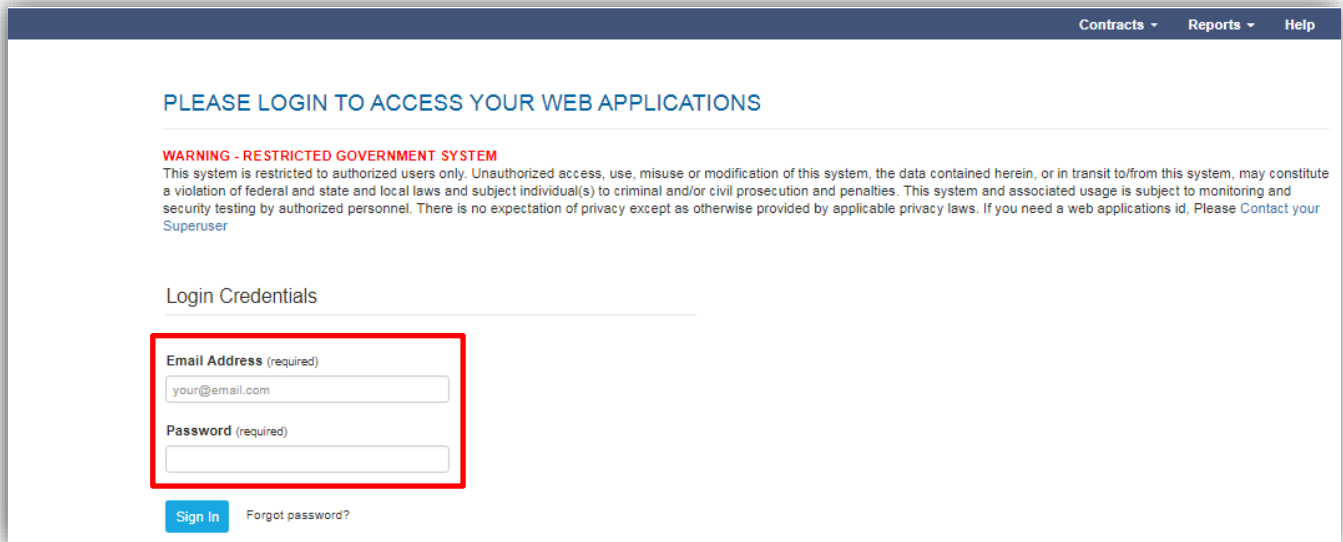
Electronic State Business Daily (ESBD) System User Guide

Welcome to the new ESBD! The look and feel is completely different, but users will find familiarity with the data entry process. To post a solicitation, users navigate the system by providing the required information. This user guide contains instructions and screen shots demonstrating the posting process from start to finish.

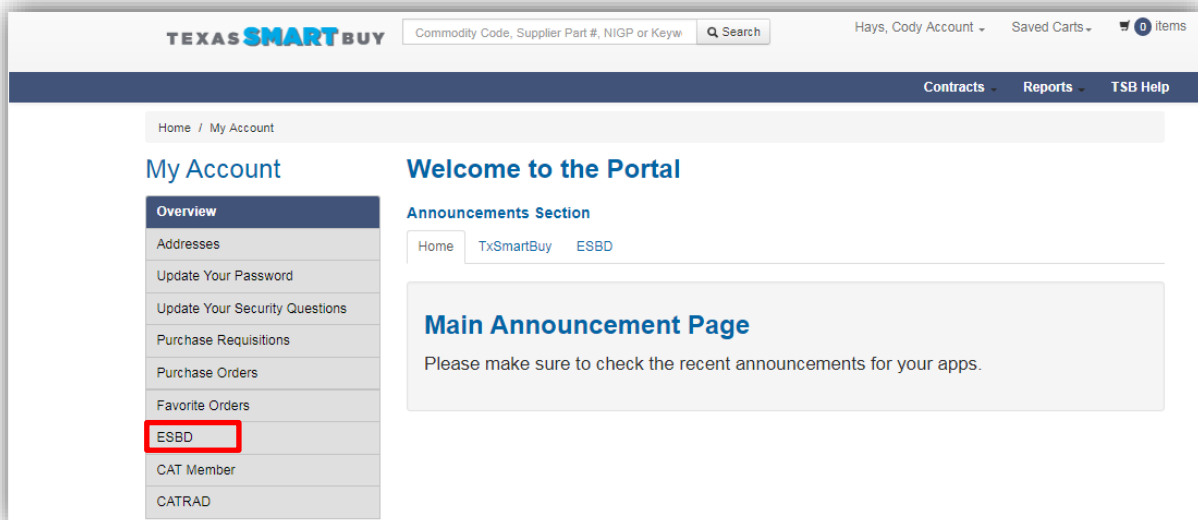
Users will login to the new [CPA Portal](#) to access the application. Your [agency superuser](#) can provide access, or you may contact the SPD [Outreach Team](#) for assistance.

Requirements before bid solicitation entry:

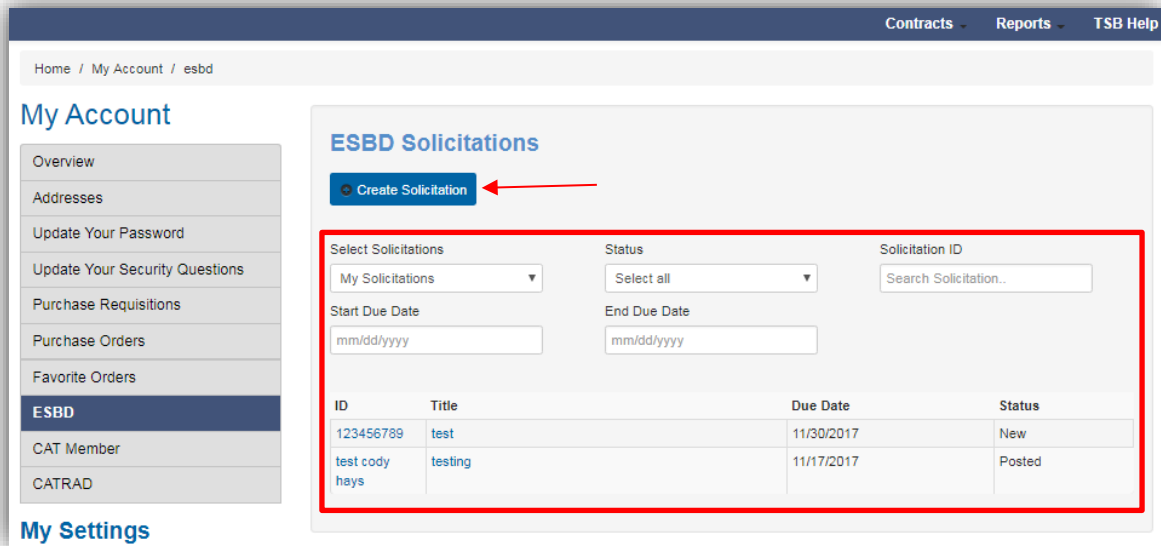
- Identify your [NIGP class/item code\(s\)](#)
 - Save your solicitation documents to your computer
1. Go to [TxSmartbuy.com](#) to login to the Portal and click the **Sign In** button. Enter your login credentials to begin.



2. Once you login, you'll be on the My Account page. Select the ESBD app on the left.



3. You can view and search posts submitted by you or your entire agency, as well as view the status. To post a solicitation, click **Create Solicitation**.



4. Users will answer the preliminary questions prior to advancing to the next step. Depending on your answers, you will proceed to post to the ESB or redirect to the CATRAD application as required by statute (state agencies only). If your solicitation is part of a Major Information Resources Project (MIRP), you'll be routed to the CATRAD application. Click **Create Solicitation** to proceed.

Preliminary Questions

Is this solicitation part of a major information resource project?

Yes No

Solicitation Amount (Total Contract Value, Initial or Renewal)

Does the solicitation contain 900 series NIGP Codes?

Yes No

Have you completed an Open Market Request?(If Applicable)

Yes No N/A

[Create Solicitation](#) [Close](#)

5. Create your solicitation notice by filling out the required fields. Click **Next** to proceed.

Home / My Account / esbd

Contracts - Reports - TSB Help

My Account

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- ESBD
- CAT Member
- CATRAD

My Settings

Profile
chay231@cpa.texas.gov

Contact Superuser
[My Agency Superuser Information List](#)

ESBD Create New Solicitation

Step 1: Create Solicitation Notice | Step 2: Add NIGP Class/Item Codes | Step 3: Upload Solicitation Document

Next

Create Base Solicitation Notice

Organization Number:
304

*Solicitation ID Number:

*Posting Requirements:
-- Please Select --

*Solicitation Posting Date:
11/03/2017

*Response Due Date:

*Response Due Time:
Hours | minutes | AM

*Title (Headline):

*Description (1500 Characters):

Note: Point of contact information to be referenced in attached documentation.

Next

6. Enter the appropriate [NIGP class/item code\(s\)](#) and click **Add** to apply them to your posting. You may add as many NIGP codes as necessary. Click the red 'X' to remove any commodity codes. Click **Next** to proceed or **Previous** to go back to step 1.

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ESBD Create New Solicitation

Step 1: Create Solicitation Notice | Step 2: Add NIGP Class/Item Codes | Step 3: Upload Solicitation Document

Previous | Next

Add NIGP Class/Item

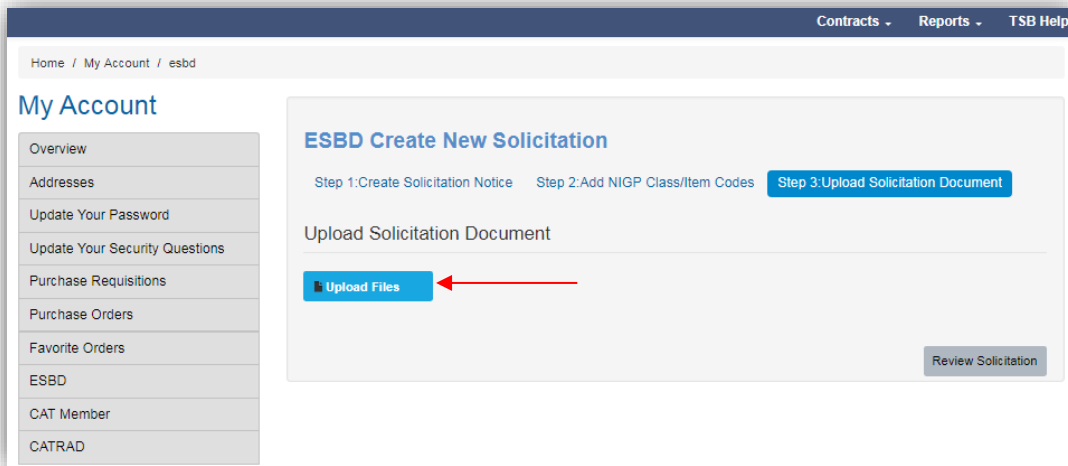
Class/Item: 07201

Please remove any dashes from the code if present.

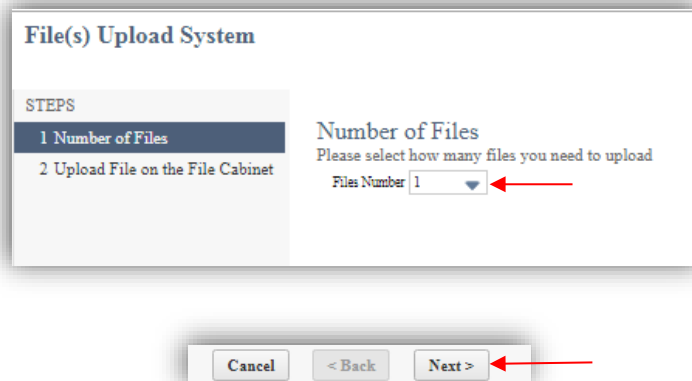
07201-Class 1 Trucks (6,000 Lb. Gvwr Or Less)

Previous | Next

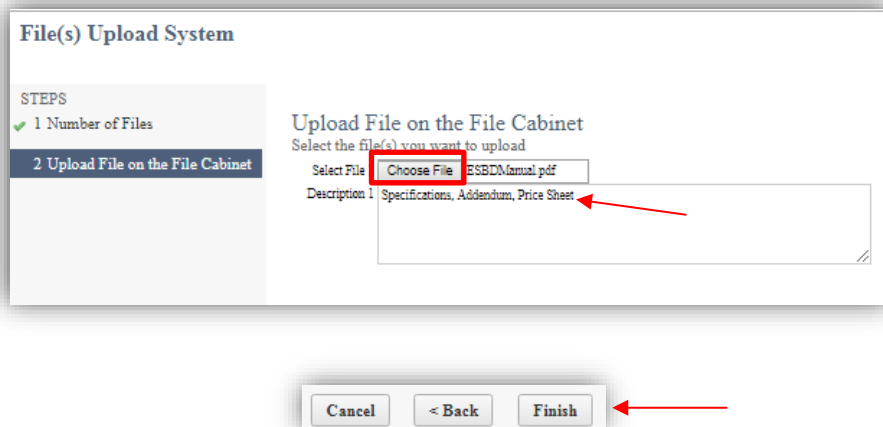
7. Click **Upload Files** to attach your solicitation documents.



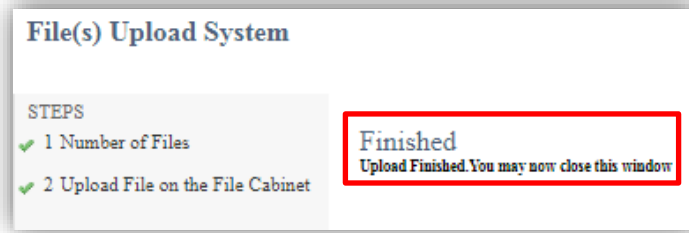
8. Use the drop-down to select the number of files to upload. Click **Next**.



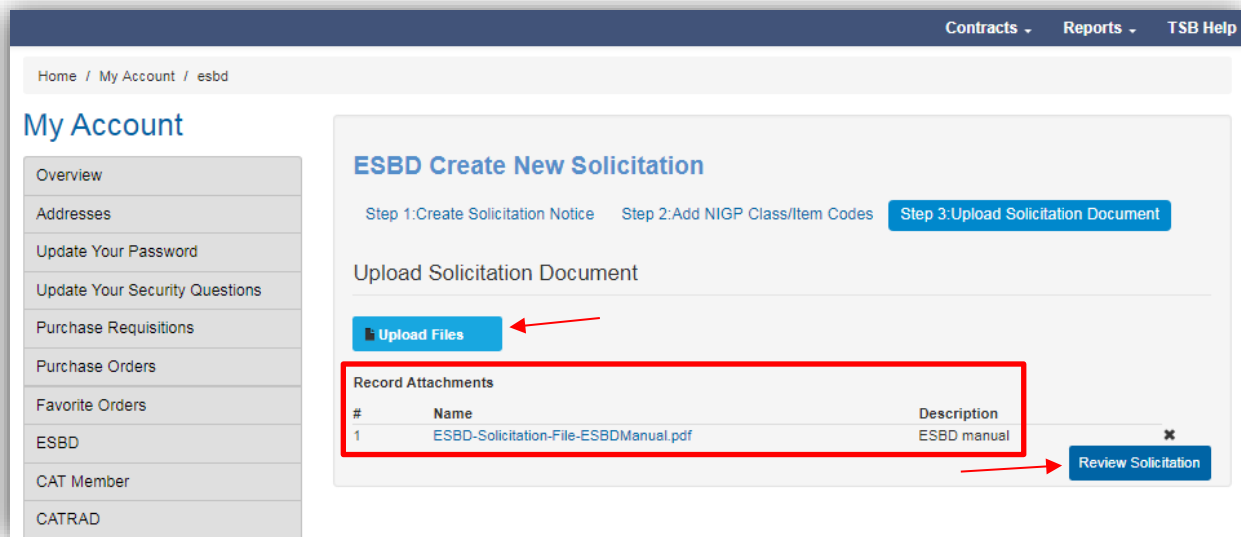
9. Click **Choose File** to locate your solicitation document(s). Enter a brief description for the file contents. Click **Finish** when complete.



10. Once complete, you will close the window to return to your posting.



11. Once your files are uploaded, you will see them at the bottom of the screen. You can continue to upload additional files, remove files or click **Review Solicitation** to proceed.



12. You can review your posting and attachments, add/remove attachments, print, cancel the solicitation, modify or approve. Click **Approve Solicitation** to go to the final screen (your posting will be publicly available depending on the Solicitation Posting Date that was entered on page 3).

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Profile
chay231@cpa.texas.gov

Solicitation Notice

[Print](#)

Status: New

Solicitation ID:304-18-123456789

Solicitation Title:Headline

Organization Name: Comptroller Of Public Accounts - 304

Posting Requirements: 14+ Days for Entire Solicitation Package

Solicitation Posting Date: 11/3/2017

Response Due Date:11/20/2017

Response Due Time: 3:30 PM

Solicitation Description: Description

Class/Item Code: 07102-All Terrain Amphibious Vehicles, Search And Rescue

[Upload Files](#)

[Approve Solicitation](#)

[Modify Solicitation](#)

[Cancel Solicitation](#)

Record Attachments

#	Name	Description
1	ESBD-Solicitation-File-ESBDManual.pdf	ESBD manual

13. On the final screen, you can still cancel or modify the posting. You will receive an email receipt of your posting along with a direct link.

Home / My Account / esbd

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chay231@cpa.texas.gov

Solicitation Notice

[Print](#)

Thank you for using the ESDB, your bid solicitation entry is now complete

Status: Posted

Solicitation ID:304-18-123456789

Solicitation Title:Headline

Organization Name: Comptroller Of Public Accounts - 304

Posting Requirements: 14+ Days for Entire Solicitation Package

Solicitation Posting Date: 11/3/2017

Response Due Date:11/20/2017

Response Due Time: 3:30 PM

Solicitation Description: Description

Class/Item Code: 07102-All Terrain Amphibious Vehicles, Search And Rescue

[Modify Solicitation](#)

[Cancel Solicitation](#)

Record Attachments

#	Name	Description
1	ESBD-Solicitation-File-ESBDManual.pdf	ESBD manual

14. Your solicitation will also be listed on your ESDB **My Account** page, including the status.

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My Settings

ESBD Solicitations

[Create Solicitation](#)

Select Solicitations: Status: Solicitation ID:

Start Due Date: End Due Date:

ID	Title	Due Date	Status
304-18-123456789	Headline	11/20/2017	Addendum Posted
12345678987654321	Headline	11/21/2017	Cancelled
123456789	test	11/30/2017	New
test cody hays	testing	11/17/2017	Posted

15. To post the Award, look in your solicitations list for a status of “Closed.” Click the solicitation ID or the title to open the solicitation. Click **Award**.

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- CATRAD

My Settings

Profile

chav231@cna.texas.gov

Solicitation Notice

[Print](#)

Status: Closed

Solicitation ID: 12379 → [Award](#)

Solicitation Title: oct 9

Organization Name: TxCPA Agency for Testing - 54321

Posting Requirements: 21+ Days for Solicitation Notice

Solicitation Posting Date: 10/9/2017

Response Due Date: 11/3/2017

Response Due Time: 3:00 PM

Solicitation Description: test

Class/Item Code: 31000-Envelopes, Plain (See Classes 525, 615, 640, 655, 665, And 966 For Other Types)

Record Attachments

#	Name	Description
1	ESBD-Solicitation-File-sunflowers.jpg	sunflower patch
2	ESBD-Solicitation-File-waylonwednesday.jpg	waylon

16. Use the Solicitation Status drop-down to select the type of award. Enter the contractor information in the fields provided. Click the green button to add fields for multiple contractors and click the red button to remove additional fields. Click **Submit** to post the award notice.

The screenshot shows a web interface for creating an award notice. On the left is a sidebar with 'My Account' and 'My Settings' sections. The main area is titled 'ESBD Award Notice' and contains the following information:

- Agency Name: TxCPA Agency for Testing - 54321
- Agency Number: 304
- Solicitation Title: oct 9
- Solicitation ID: 12379

The 'Solicitation Status' is a drop-down menu currently set to 'Please Select'. Below this is a table with two rows for contractor information:

Contractor Name	Mailing Address	Value Per Contractor	Hub Status	Award Date	
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	Select <input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	Select <input type="text"/>	<input type="text"/>	<input type="button" value="Remove"/>

At the bottom left of the main area is a blue 'Submit' button. Red arrows point to the 'Solicitation Status' drop-down, the 'Add' button, the 'Remove' buttons, and the 'Submit' button.