

OCTA BUSINESS EXPO **ACCELERATING OPPORTUNITIES**

OCTA BOOT CAMP – CONTRACTING WITH OCTA

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OCTA BOOT CAMP

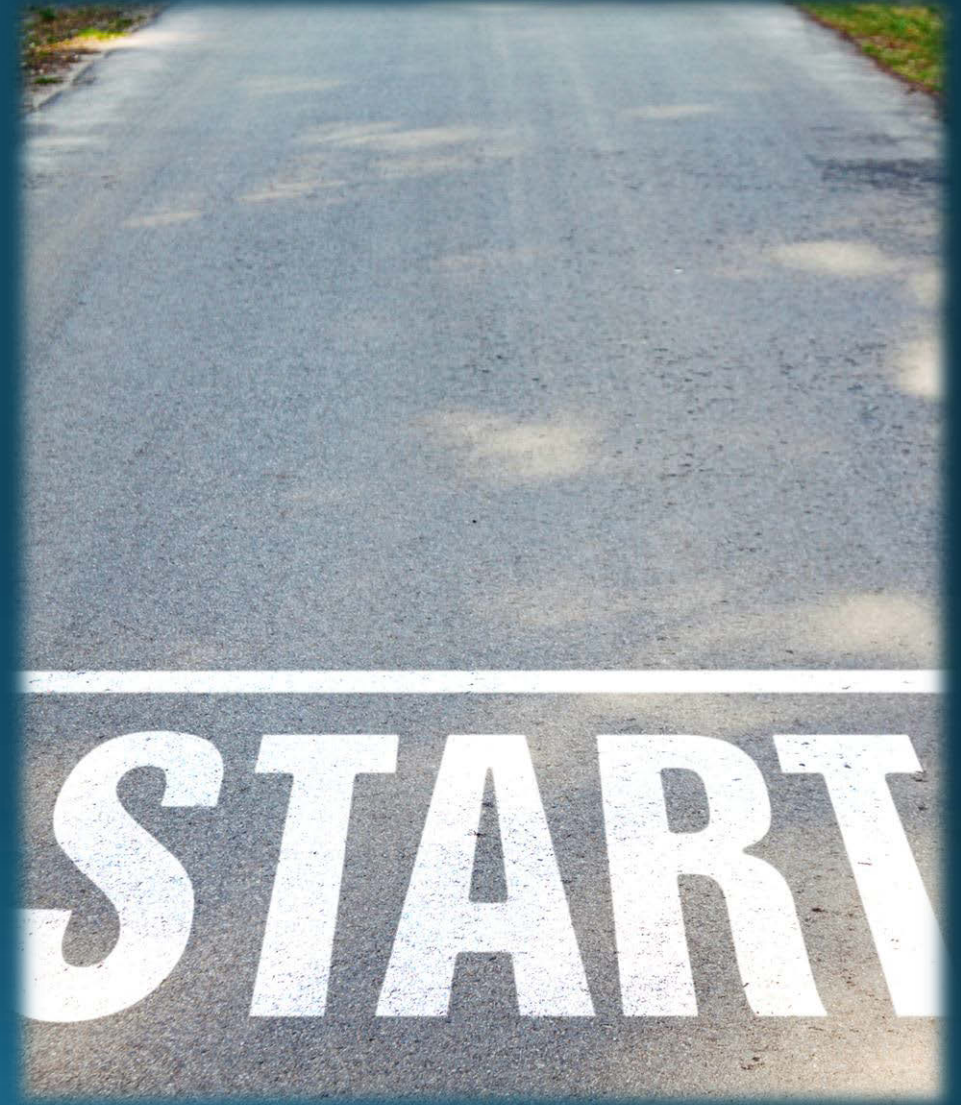
- 18,698 vendors registered
- Many firms awarded contracts
- 26% of OCTA's contracts awarded to small business



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GETTING STARTED

- Vendor Registration
 - Available online
 - Ability to view procurements & awards
- Vendor Certification
 - Disadvantaged Business
 - Small Business



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PRE-MARKETING

- Budget Documents
- Newspaper Articles
- Agency Websites
- Attending Conferences/Trade Shows
- Participating in Professional Business Organizations



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MARKETING

- Vendor Training Sessions
- Face to Face Meetings
- OCTA CAMMNET Connect
- Previous Award Information/
Networking



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GO/ NO GO DECISION

- Core Business
- Competitors
- Price Competition
- Success Factors



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PREPARE YOUR FIRM

- Download the Solicitation & *Read It*
- Key Procurement Dates
- Attend Pre-Proposal Conference with interest
- Network your firm
- Request last winning proposal



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PREPARE YOUR PROPOSAL

- Review Evaluation Criteria
- Include relevant information and experience
- Include resumes and history of projects
- Provide quality references



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PREPARE YOUR PROPOSAL

- Address requirements of Scope of Work
- Tell us how you propose to provide the services
- Do NOT reiterate our Scope of Work



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PREPARE YOUR PROPOSAL

- Submit a quality proposal
- Know your competition
- Be realistic



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But I Didn't Win

- Don't give up
- Ask for Debrief
- Be open to feedback
- Request copy of winning proposal



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Key Elements of Invoicing OCTA

- Items to Include on your Invoice
 - Purchase Order or Contract Number
 - Invoice Number
 - Date of Invoice
 - Backup or other items required by your Contract
- Send directly to OCTA Accounts Payable
- Provide current W-9 IRS Form





PO Box 843000
Los Angeles, CA 90084-3000
(949)333-2300
www.trace3.com

Invoice

Date	Invoice #
9/25/2014	66407

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Bill To
OCTA 550 South Main Street - PO Box 14184 Orange, CA 92863-1584 Accounts Payable

Ship To
PO-Administration Building 600 South Main Street Orange, CA 92868 Attn: Barry Reynolds breynolds@octa.net 714.560.5527

Customer PO #	Sales Order #	Sales Rep	Ship Date	Terms	Due Date	Shipping Method
A29738	Sales Order #44434	Stanley, Michael	9/25/2014	Net 30	10/25/2014	Ground
Item	Qty	Description	Unit Price	Tax	Amount	
NX-1450	1	"1. Nutanix Virtual Computing Platform - Compute - Hypervisor agnostic Integration Manager - 8 x Intel 6-core Xeon E5-2620 processors 2. Nutanix Virtual Computing Platform - Storage - Nutanix Controller VM - Nutanix Virtualization-ready Platform - Nutanix Information Lifetime Management - Nutanix Data Protection and Availability - Nutanix Automatic Storage Provisioning - Nutanix Advanced Storage Management - Nutanix Capacity Optimization - Nutanix Seamless Scale-out - 1.6TB SSD Capacity (for High Priority Data and MDS) - 16TB HDD Capacity (for Data Storage) 3. Nutanix Virtual Computing Platform - Management"	53,100.00	Yes	53,100.00	
C-MEM-128GB-1050	4	Config: Includes 128GB (8x16GB) on each NX-1050 node	\$ 1,475.00	Yes	5,900.00	
NOS-3.5.2	1	Nutanix Operating System Version 3.5.2	0.00	Yes	0.00	
Default-Hypervisor	1	Default Hypervisor Option	0.00	Yes	0.00	
S-PLAT-1450-1YR	1	1YR PLAT System support for Nutanix NX-1450 Months: 12	\$10,710.00		\$10,710.00	
C-CBL-3M-SFP+-SFP+	10	Cable 3m SFP+ to SFP+	\$71.04	Yes	710.40	
UNODE-128GB-1050	1	Upgrade node, 128GB for NX-1050	\$15,000.00	Yes	15,000.00	
S-PLAT-1150-1YR	1	"1YR PLAT System support for Nutanix Months: 12 NX-1150"	\$2,677.50		2,677.50	

RECEIVED

SEP 25 2014

ACCOUNTS PAYABLE

TRACE3

PO Box 843000
Los Angeles, CA 90084-3000
(949)333-2300
www.trace3.com

Invoice

Date	Invoice #
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Item	Qty	Description	Unit Price	Tax	Amount
<p>OK Barry Rosen 1284-7028-A5352-TW7 \$ 89,607.23 1284-7012-A5352-41E 1284-7012-A5352-41E \$ 13,387.50 10/1/14</p>					
			Subtotal		88,097.90
			Shipping Cost (Ground)		0.00
			Tax (CA_ORANGE CO_AHXL 8.0%)		5,976.83
			Total		94,074.73
			Amount Due		\$94,074.73

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Invoice Approval Process

- Project Manager Review and Approval
 - Amount is correct and legally due
 - Expense in compliance with statutes and OCTA policies
 - Complies with contract terms – rates, scope, period of performance, etc.
 - Payment is within approver's fiscal responsibility and dollar limits

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Accounts Payable Invoice Review

- Employee signing invoice has appropriate authority
- Verify available funds on contract
- Verify correct vendor (current W-9 IRS form on file)
- Account codes on invoice match what is in the system
- Sales tax compliance
- Verify retention percent and amount are correct
- For inventory, matching receipts is required.
- If detailed on the contract, spot check rates to verify compliance with the contract terms.
- Verify compliance with OCTA policies and procedures

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E-Payables Program

- What is E-Payables?
- Benefits of E-Payables
 - Faster Payment
 - Increased Efficiency
 - Increased Security

