

System Requirements and Browser Compatibility

Browser Version

System features are best viewed in the browser versions listed below. Other browsers or versions may not display correctly.

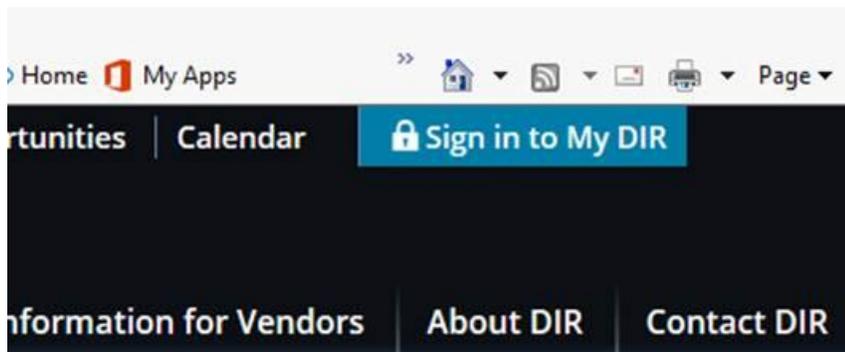
- Google Chrome 34+(Recommended)
- Firefox 26+
- Internet Explorer 10+

Who Should Use this System?

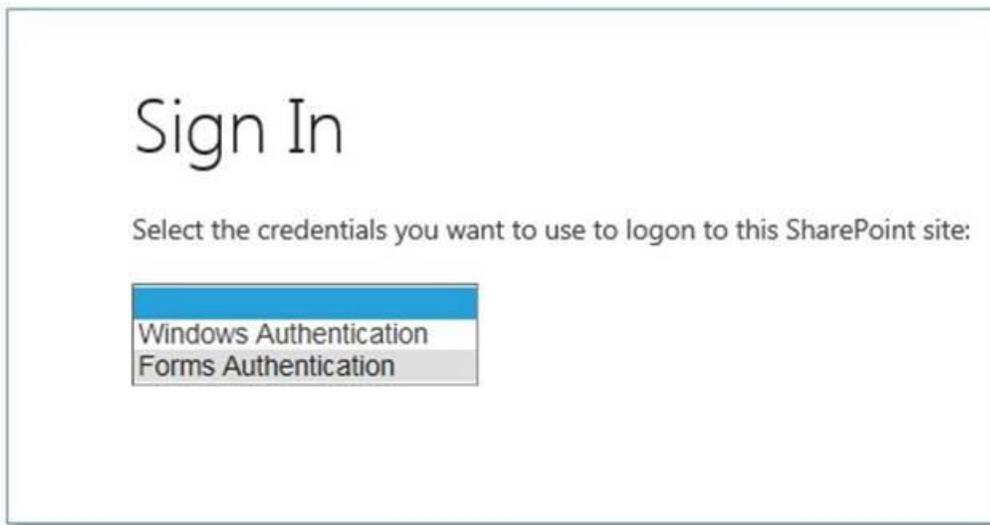
- State agencies should utilize the form to submit their Draft and Final SOWs to DIR for review and approval.
- State agency purchasers who have been identified by their agency as Users or Superusers may submit a Draft SOW and Final SOW form into this system.

Customer Portal Login

To gain access to the SOW Application, approved Agency Users must login to the Customer Portal by selecting “Sign in to My DIR” from the DIR home page.



Select “Forms Authentication”.



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Enter a valid user name and password. Requests to add, change or remove Users need to be submitted from a Superuser at the agency to: identity.support@dir.texas.gov.



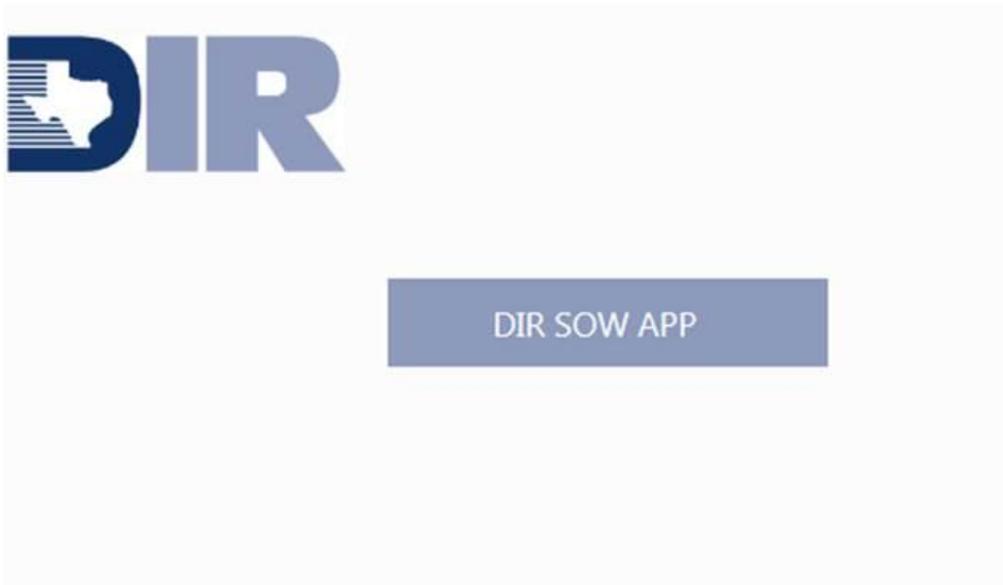
External Users Please sign in below to continue:

Username:

Password:

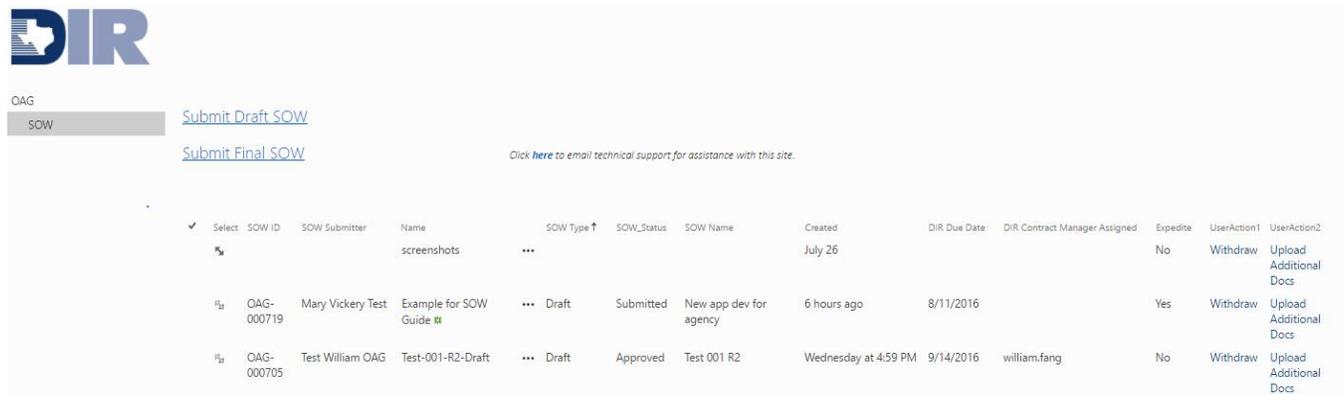
Remember Me

Once the User is authenticated, the Customer Portal will be displayed for the appropriate agency. On the left navigation pane, there will be a link to the SOW Application. The example below is the Customer Portal for the Texas Department of Information Resources with a single link to *DIR SOW*.



SOW Application

Select the *SOW link* to launch your agency’s instance of the SOW Application. This application contains all previously submitted SOW records for your agency. The initial page displayed is the *application landing page*. From this page, Agency Users may view existing SOWs, initiate the submission process for new SOWs, upload additional documents or withdraw an SOW. This page also serves as the central location for Users to monitor the status of submitted SOWs.



The submission process consists of two steps: Draft SOW Submission and Final SOW Submission. The submission of the Draft SOW is expected to take place prior to vendor solicitation. After the Draft SOW is reviewed and approved by DIR, the Agency User submits the approved SOW to the selected DIR vendors. After the agency and vendor execute a final version of the SOW, submit the Final SOW for DIR’s final approval and signature.

The following fields are available on the application landing page.

Field Name / Term	Definition
Agency Superuser (Superuser)	Name of User within an agency with full permissions to submit SOWs, track, withdraw, etc. SOWs for that agency.
Created	Date on which the SOW was submitted for review.
Customer Portal or “My DIR”	Required by SB20 as a method for State Agencies to submit Draft and Final SOWs for review and approval by DIR prior to award.
DIR Contract Manager Assigned	Name of the Contract Manager assigned to process the SOW.
DIR Due Date	Anticipated date for DIR to complete processing the SOW; thirty business days for draft and three (3) business days for final reviews, with day one beginning the 1 st full day from date submitted.
Expedite	Indicates whether the Submitter’s request to review a SOW must be Expedited; Expedited Requests require a letter from Agency Executive Director, or their designee, and gives DIR three (3) business days to review.
Name	Name of the SOW file.
SOW Name	Name of the SOW.
SOW Status	Reflects the current status of a submitted SOW.
SOW Submitter (Submitter)	Name of Agency User submitting the SOW; at least one (1) per Agency.

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Field Name / Term	Definition
SOW Type	Indicates the type of SOW submission; there are two (2) types of SOW submissions: Draft and Final.
SOW ID	Unique ID number assigned to each submitted Draft SOW submitted for DIR approval.
User	Agency assigned personnel to work within the DIR SOW Submission Application; refers to Submitter & Superusers, as well as DIR Users.

Draft SOW Header

1. **Enter SOW Name:** The name of your project. This should be used throughout the submission process for reference.
2. **Enter SOW Scope:** Enter a brief description of the SOW Scope (750 characters or less).
3. **Enter Estimated Value:** Enter the estimated value of your procurement. This should include the purchase order amount and any anticipated Purchase Order Change Notices (POCNs). *Note: Maximum value is \$1,000,000. You may include commas, but do not enter dollar sign. Do not include decimals or cents.*

Services Type

1. Select the appropriate service type for the SOW.
2. The service type selected should correspond to the DIR vendor contract(s) to whom you will submit your pricing request. Please select “Other” only if the Service Type for your SOW is not found in the list.

Contract Numbers and Vendors

- This output field will be populated by the application with the relevant customer numbers and vendor names for the selected Service Type. It should correspond to the DIR vendor contract(s) to whom you will submit your pricing request. If your Estimated Value is more than \$50,000 but less than \$150,000 you will be required to select three (3) or more contracts. If the Estimated Value is greater than \$150,000 but not more than \$1 million, you will be required to select six (6) or more contracts. If the number of contracts available is less than the required amount, you will be required to select all available contracts.
- Select the *Select/Deselect all checkbox* to select all entries in this list.

Additional Contract Numbers

If an active DIR contract is not available for selection, you may enter that number here. The DIR SOW review process will determine if that contract should be in the list of available contracts for the Service Types selected.

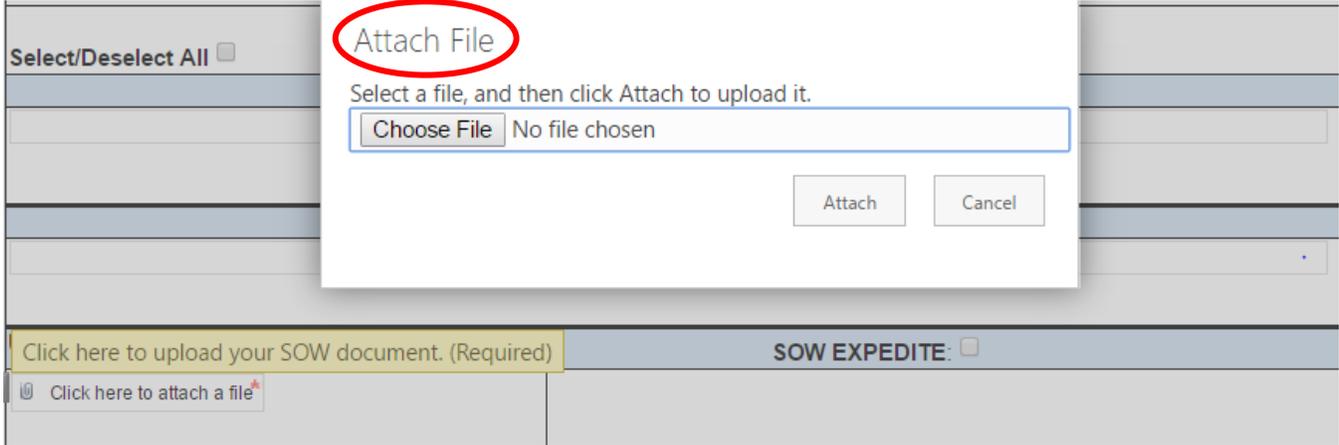
Comments

Please insert any information that you determine to be relevant. For example, add descriptive text explaining any additional contract numbers that were not available to be selected.

Upload SOW Draft File

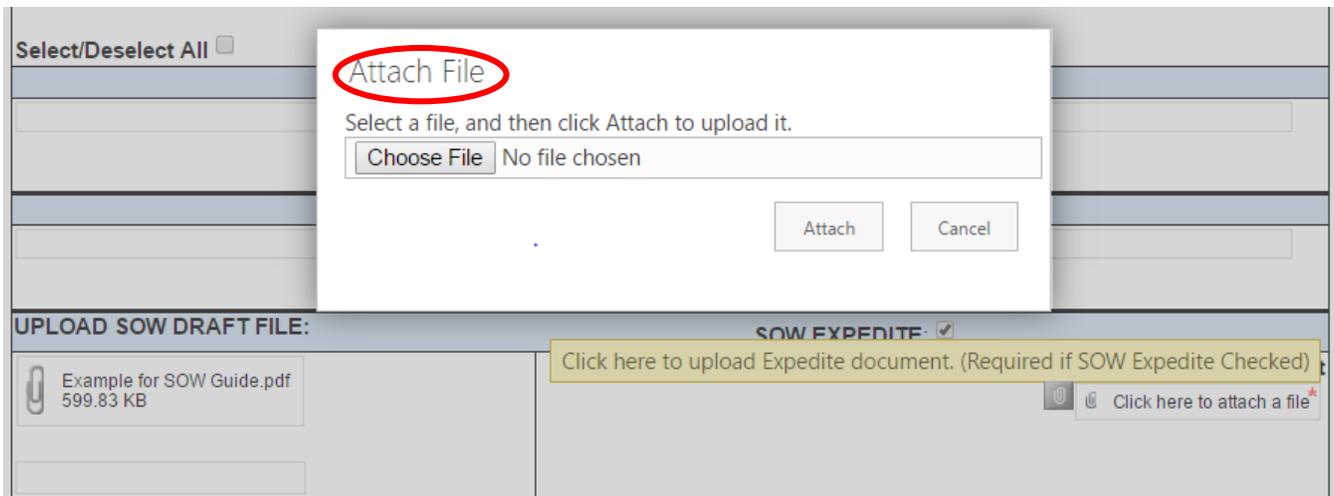
1. Upload SOW draft file(s). *Note: If you have more than one document to attach, consider scanning or consolidating files into one (1) file prior to attaching. Additional documents may be uploaded after a draft or final SOW has been submitted. Instructions for this is provided later in this User Guide.*

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SOW Expedite

If an Expedited review is needed, please select the *SOW Expedite checkbox*. You will then be required to upload your agency's Expedite letter signed by Executive Director (or designee).



DIR Due Date

This is an auto-generated field.

- Expedite not checked = thirty (30) business days with day one (1) beginning the 1st full day from date submitted.
- Expedite checked = three (3) business days with day one (1) beginning the 1st full day from date submitted.

Review and Submit button

Select the Review and Submit button to confirm and complete your submission.

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UPLOAD SOW DRAFT FILE:		SOW EXPEDITE: <input type="checkbox"/>
 1) SOW_DRAFT_PDF_EM - Copy (13).pdf 180.16 KB		
Note: Submit one (1) SOW Draft file. Combine multiple documents into a single PDF file if needed.		
DIR DUE DATE:	<input type="text" value="2/3/2016"/>	REVIEW AND SUBMIT
SOW Draft Submission		

Upload SOW Draft File:		SOW Expedite: False
 1) SOW_DRAFT_PDF_EM - Copy (13).pdf 180.16 KB		
DIR Due Date:	<input type="text" value="2/3/2016"/>	<input type="button" value="Edit"/> <input type="button" value="Confirm Submit"/>
SOW Draft Confirm		

Edit

Select edit button to edit any field as necessary. Once you are done editing, you'll need to select the Review and Submit button to proceed.

Confirm Submit

Select Confirm Submit button to save the record and submit it to DIR's contract management staff for processing.

Once a Draft SOW is submitted successfully, a confirmation message is displayed with the SOW ID and the SOW Name. The Agency User will also receive an automated email with more details around the request.

Your SOW Draft has been successfully submitted to DIR!	
An email will be sent to you with more detailed SOW information. Thank you.	
SOW ID: OAG-000719	SOW Name: New app dev for agency

Instructions for Final Statement of Work Submissions

Click the *Submit Final SOW* link at the top of the application landing page to launch the SOW Final Submission page. This page will allow the User to update a Draft SOW record with a Final SOW document and all data relevant to the request.

<h1>SOW Final Submission</h1>	
<h2>Statement of Work User Guide</h2>	
DIR Website	SB20 Quick Reference Sheet
SOW ID:	<input type="text"/>
SOW Name:	<input type="text"/>
SOW Scope:	<input type="text"/>
SOW Estimated Value:	<input type="text"/>
SOW Final Value:	<input type="text"/>
SOW Start Date:	<input type="text"/>
SOW End Date:	<input type="text"/>
Select Contract Awarded:	<input type="text"/>
Final Selected Contract:	<input type="text"/>
Comments:	<input type="text"/>
Upload Final SOW Document:	<input type="text"/>
DIR Due Date:	<input type="text" value="8/11/2016"/>
<input type="button" value="Review and Submit"/>	

SOW Final Submission

Final SOW Header

1. **SOW ID:** Select the appropriate SOW ID from the dropdown. Note: Only approved SOW Drafts will be displayed in this dropdown list. This reference number was provided when receipt of your Draft SOW was confirmed. Please use this reference number throughout the submission process. *Note: Draft SOWs created prior to March 7 2016 may have been issued a new SOW ID# with the launch of the new portal. Please contact the DIR Contract Manager that reviewed the SOW if you cannot locate the ID#.*
2. **SOW Name:** This is the name of the SOW that was provided during the Draft SOW Submission.
3. **SOW Scope:** SOW Draft Scope will be displayed. This is an editable field and can be modified as necessary.
4. **SOW Estimated Value:** This is the estimated value that was provided during the Draft SOW Submission.
5. **SOW Final Value:** Enter the final value for the SOW. this should include the purchase order amount and any anticipated Purchase Order Change Notices (POCNs). *Note: Maximum value is \$1,000,000. You may include commas, but do not enter dollar signs. Do not include decimals or cents.*
6. **SOW Start Date:** Enter the anticipated start date for the SOW. NOTE: The start date may not be sooner than the DIR Due Date.
7. **SOW End Date:** Enter the expected end date for the SOW.

Contract Awarded

Select the awarded DIR contract from the dropdown list.

SOW Start Date: SOW End Date:

Select Contract Awarded:

- DIR-TSO-2558 - KPMG LLP
- DIR-TSO-2584 - Northrop Grumman Systems Corporation

Choose Awarded Contract.

SOW Comments:

Selected Contract

The selected contract will be displayed here.

Select Contract Awarded:

- DIR-TSO-2584 - Northrop Grumman Systems Corporation

Final Selected Contract:

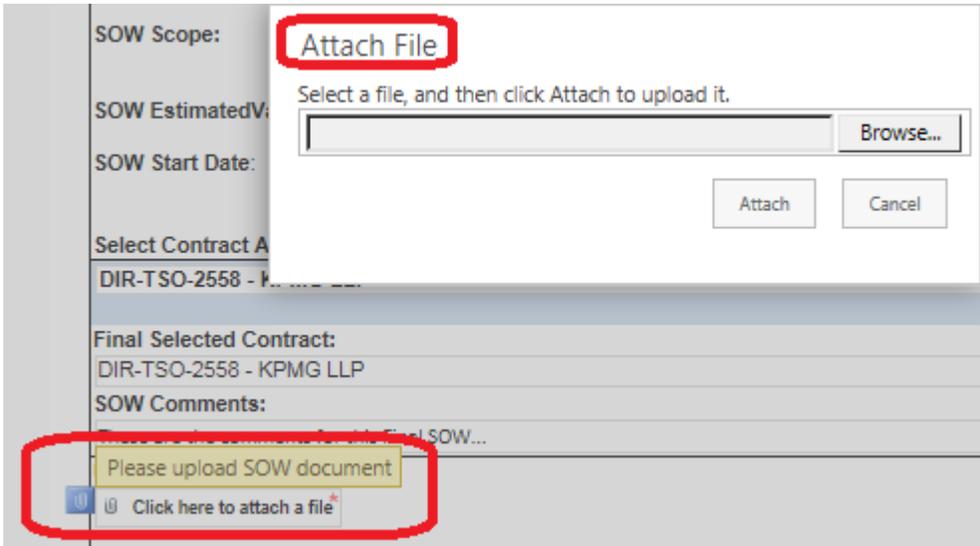
DIR-TSO-2584 - Northrop Grumman Systems Corporation

SOW Comments

Please insert any information that you determine to be relevant in the Comments field.

Upload Final SOW Document

1. Upload Final SOW that has been signed by the agency and the awardee. *Note: Final SOW Document must be in Adobe (pdf) format. If you have more than one (1) document to attach, consider scanning or consolidating files into one (1) file prior to attaching.*

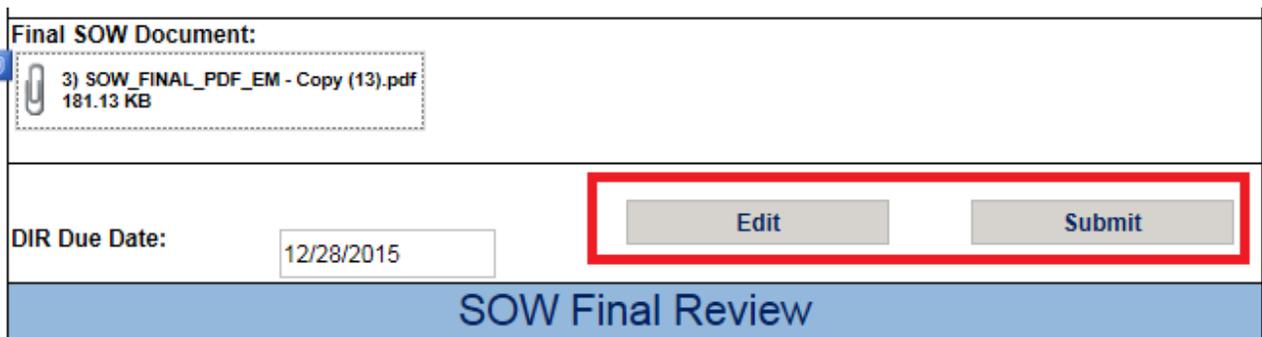
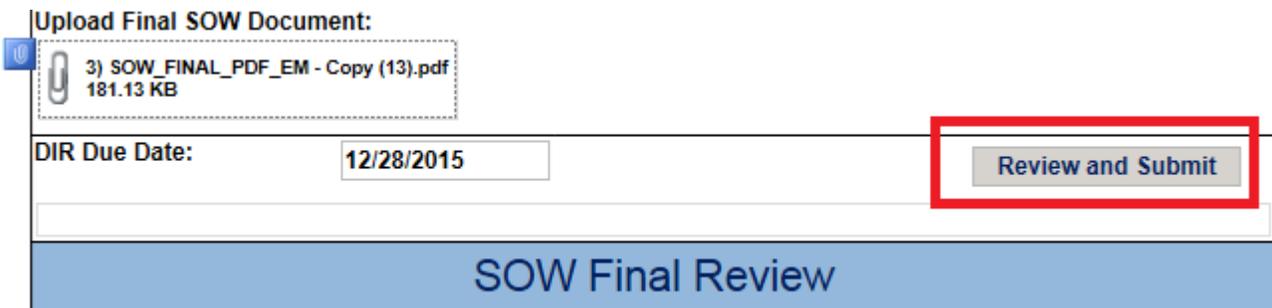


DIR Due Date

The DIR SOW review process is expected to take no more than three (3) business days with day one (1) beginning the 1st full day from date submitted.

Review and Submit button

Select this button to complete validation (Review and Submit) the Final SOW form to DIR for review, approval and signature.



Edit

Select this button to edit any field as necessary. Once you are done editing, you'll need to select the Review and Submit button to proceed.

Submit

Select this button to save the record and submit it to DIR's contract management staff for processing.

Once a Final SOW is submitted successfully, a confirmation message is displayed with the SOW ID and the estimated DIR Due Date.

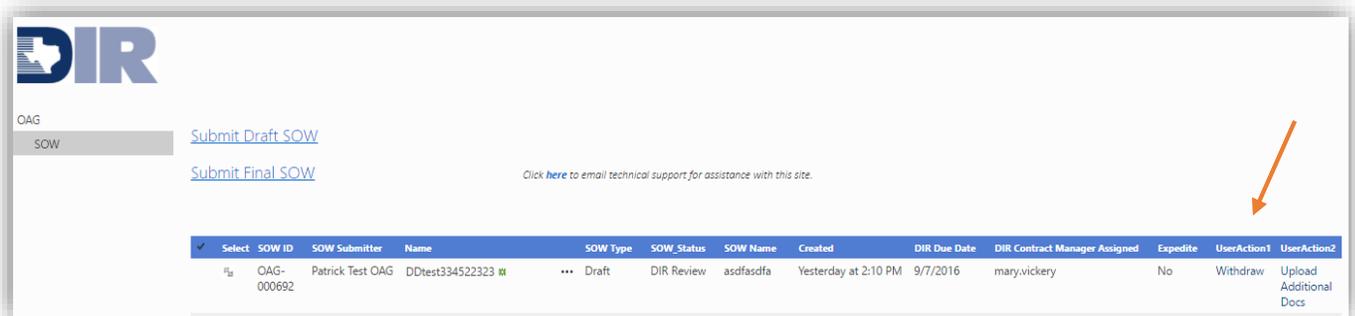
Your Final SOW has been successfully submitted to DIR!
An email will be sent to you with more detailed SOW information. Thank you.

SOW ID	DIR Due Date
OAG-000691	8/11/2016

Withdrawing a Submittal

Both draft and final SOWs may be withdrawn by an Agency. Once an SOW is withdrawn, no further action can be taken by the submitting Agency or DIR.

From the SOW landing page, locate the SOW to be withdrawn. Select Withdraw:



A new page will appear. Enter a comment and select with Withdraw button. An Agency does not need to provide DIR justification for the withdrawal, only a statement advising the SOW is being withdrawn.

SOW

Start "Withdraw": DDtest334522323 ⓘ

SOW Withdrawal Form

Pease enter the reasons for withdrawing:

Project on hold.

The Agency submitter will receive an acknowledgement e-mail for the withdrawal.

Upload Additional Documents

In instances where additional documentation is required, the following steps are taken.

From the SOW Portal, select Upload Additional Docs for the applicable SOW.

[Submit Draft SOW](#)

[Submit Final SOW](#) Click [here](#) to email technical support for assistance with this site.

✓ Select	SOW ID	SOW Submitter	Name	SOW Type	SOW_Status	SOW Name	Created	DIR Due Date	DIR Contract Manager Assigned	Expedite	UserAction1	UserAction2	
<input checked="" type="checkbox"/>	OAG-000695	Patrick Test OAG	Sample SOW	...	Draft	DIR Review	Test DBITS SOW	5 days ago	9/8/2016	mary.wickery	No	Withdraw	Upload Additional Docs

Upload the additional document and add comments in the comments box.

SOW Additional Document Submission	
<p>SOW ID: OAG-000695</p> <p>Upload Additional Document</p> <div data-bbox="581 373 943 456"> Additional Document notice.pdf 116.04 KB</div>	
<p>Comments:</p> <div data-bbox="370 497 1128 716">Corrections made to SOW reflecting new point of contact.</div>	
<p>REVIEW AND SUBMIT</p>	

Select Review and Submit.

SOW Additional Document Submission	
<p>SOW ID: OAG-000719</p> <p>Upload Additional Document</p> <div data-bbox="532 1284 1013 1371"> 2013.4.2 Government & Legislation.pdf 18.9 KB</div>	
<p>Comments: NOTE: Word-wrap may not be automatic - please enter carriage returns</p> <div data-bbox="344 1423 1377 1686">Additional documentation for SOW submitted</div>	
<p>Edit Confirm Submit</p>	

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You will have the option to edit prior to submitting. After you have reviewed your submission, select Confirm Submit.

A message will display advising the submission was successfully submitted to DIR.



Your SOW Additional Document has been successfully submitted to DIR!

Technical Support

Should you require additional assistance with technical support simply email identity.support@dir.texas.gov and include a statement regarding your specific need.

Thank you for using the DIR Statement of Work (SOW) Submission Portal!

Technology Sourcing Office

Texas Department of Information Resources