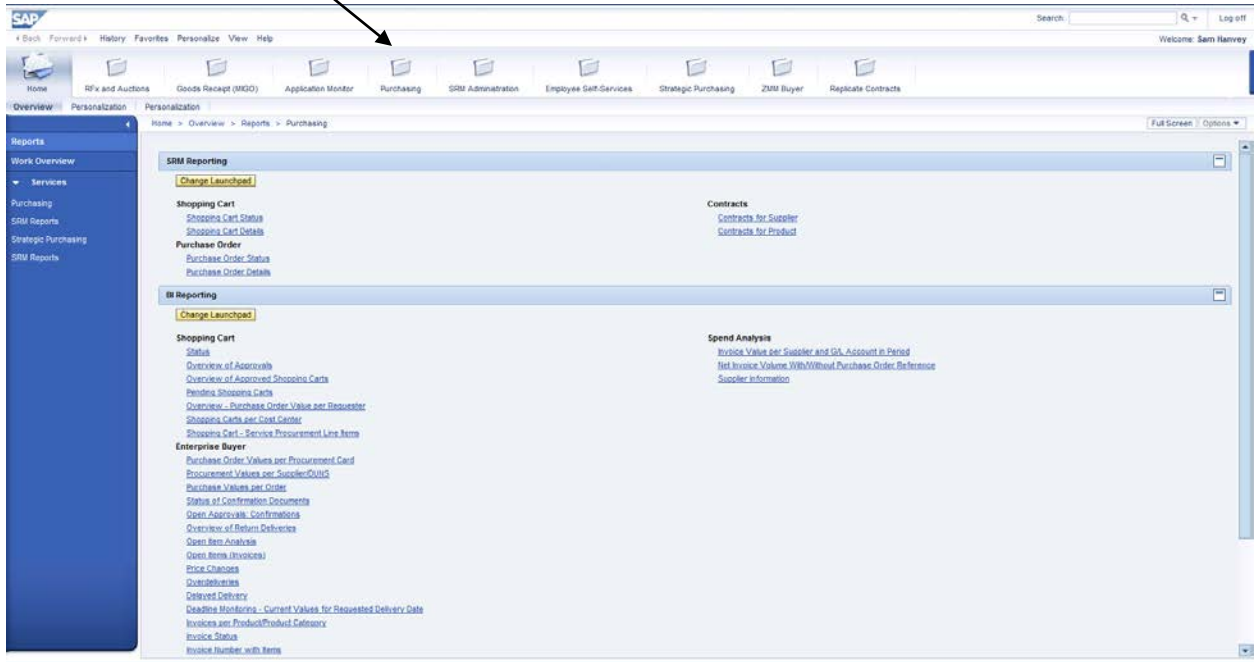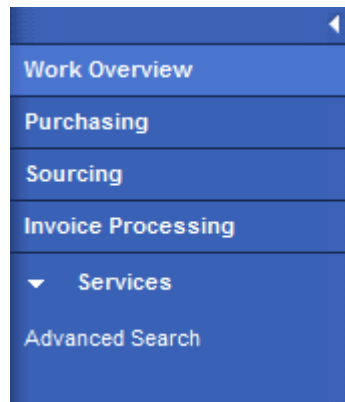# Exercise 1

Perform Sourcing
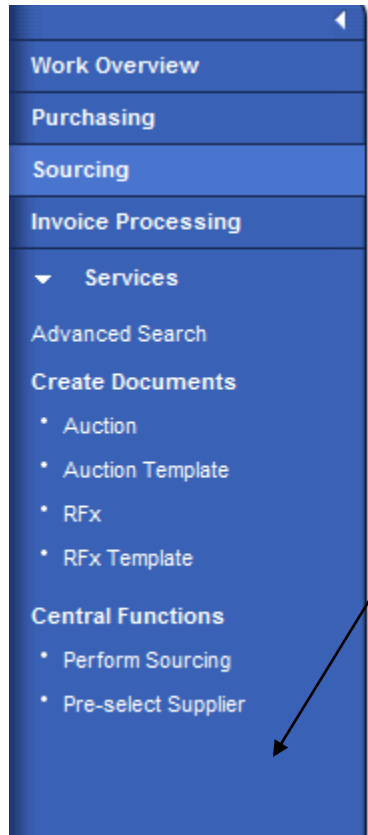
Exercise 1: Perform Sourcing

1. Log into SRM.

**2.** Click **Purchasing** folder across the top of the screen.

3. Click **'Sourcing'** in the blue menu bar on the left-hand side of the screen.

4. Scroll to the bottom of the blue menu bar. Click on **'Perform Sourcing'** under the 'Central Functions' heading.

5. A new screen **'Assign Sources of Supply: Step 1 (Select Requisition)'** will appear with search criteria fields. Note: Maximize your screen to follow the steps.
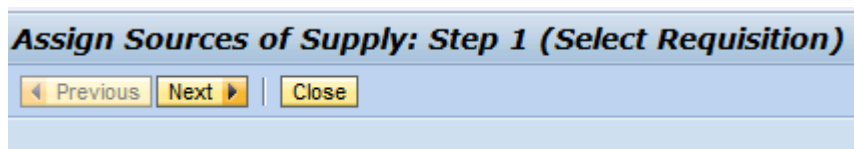
6. Use the Search Criteria to search for the requisition (shopping cart) to convert into an RFx. You can search by any of the criteria listed. In this example search by your Purchasing Group. Click on the **Search Icon** in the Purchasing Group box. Find your P-Group in the Pop-up Box, Click on the name of the P-Group and Click **OK**.

7. Click on **'Search'** after entering your specific search criteria. This will retrieve only the Requisitions that are, (a) approved and (b) match the search criteria.

8. Locate the requisition that includes **"PR235 Exercise 1"** in the description. There should be 2 line items. Highlight the Requisition items that need to be processed. Note: Because there are multiple lines in a single requisition, highlight all line items with same requisition number (i.e.: 2000999999/1, 2000999999/2, 2000999999/3, etc.).

9. Select **'NEXT'** at the top of the screen. This takes you to Step 2: Assign Sources of Supply.
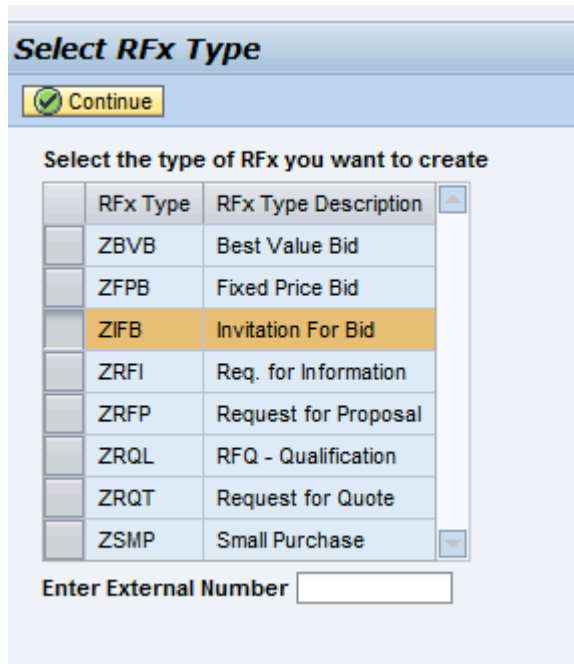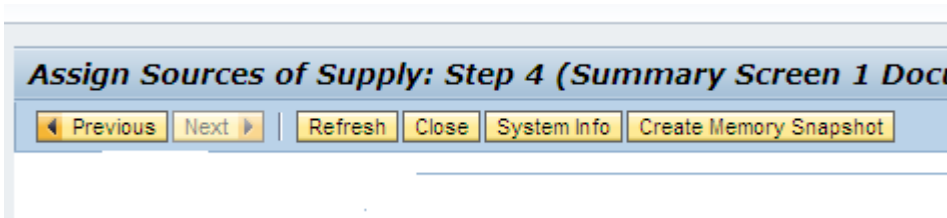
10. Make sure all line items are selected. Click **'Create Draft'** Create Draft ▲. Use the drop down to select **RFx**. This takes to you to Step 3: Review Drafts.

Assign Sources of Supply: Step 3 (Review Drafts (1 Items))

◄ Previous | Next ► | | Process All Drafts | Close | Process Selected Drafts | Edit Selected Drafts
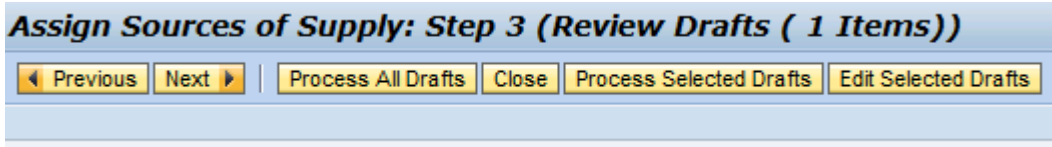
11. In the **'Created Drafts'** section, under the column titled **'Transaction Type',** use the drop down to select the appropriate solicitation type from drop down box (ZIFB: Invitation for Bid, ZRFP: RFP, ZBVB: Best Value Bid, etc.). For this exercise, select **ZIFB: Invitation for Bid**. NOTE: Once the RFx is created, the transaction type may not be changed.

Select RFx Type

✅ Continue

Select the type of RFx you want to create

	RFx Type	RFx Type Description
	ZBVB	Best Value Bid
	ZFPB	Fixed Price Bid
	ZIFB	Invitation For Bid
	ZRFI	Req. for Information
	ZRFP	Request for Proposal
	ZRQL	RFQ - Qualification
	ZRQT	Request for Quote
	ZSMP	Small Purchase

Enter External Number [   ]

12. Click on **'Process Selected Drafts'** at the top of the screen. This takes you to Step 4: Summary Screen.

Assign Sources of Supply: Step 4 (Summary Screen 1 Docu

◄ Previous | Next ► | | Refresh | Close | System Info | Create Memory Snapshot

13. Summary screen shows the RFx Solicitation number '54xxxxxxxx' just created.

Note: Since you have just created an RFx document and it has not been fully completed, you will receive error messages each time. The message (example shown below) will not stop the RFx document creation even though the message is in red. You must edit the RFx clear the errors and publish.
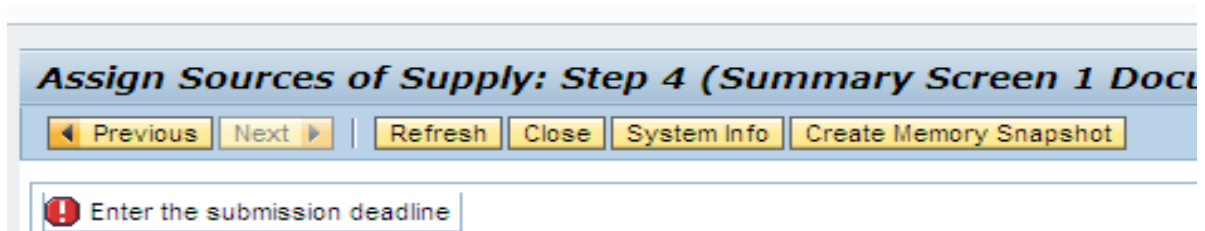
You have successfully taken a requirement from 'Perform Sourcing" and started the bid invitation process.

RFx Created: _____