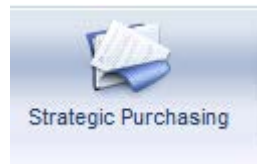


Exercise 2

Edit RFx

Exercise 2: Edit RFX

1. Click on the ‘**Strategic Purchasing**’ tab at the top of the screen.



2. Click on ‘**Strategic Sourcing**’ from the blue menu bar on the left-hand side of the screen.



3. Under the ‘**Active Queries**’ heading, click on **RFXs ‘All’**. This will generate a list of all solicitations regardless of their status.
4. Click on the **RFX Number** that was created in Exercise 1. This will open the RFX in a new window. **NOTE:** Maximize the window to complete the remaining steps.

Display RFX :

Edit Close Copy Check Close Rfx Responses and Awards Create Follow-on RFX Convert to Auction Export Print Preview Questions and Answers (0) System Information Create Memory Snapshot Related Links

RFX Number 540006687 Smart Number Web Site Design Project Type Request for Proposal Status Published Created On 09/25/2013 13:49:18 Created By Mr. Sam Hanvey, CPPB APM Time Zone EST
 Version Number 5 Version Type Active Version External Version Number 4

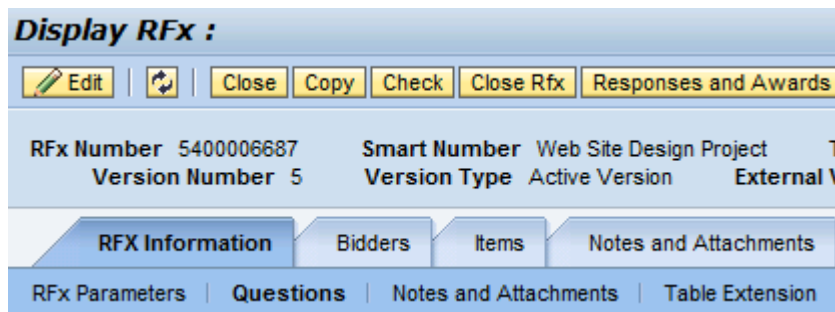
RFX Information Bidders Items Notes and Attachments Weights and Scores Approval Tracking

RFX Parameters Questions Notes and Attachments Table Extension

5. Click on ‘**Edit**’ to make changes to the RFX document. On the **RFX Information Tab**, the fields that should be entered on the **RFX Parameters** screen are:

- **RFX Name** – what you want the solicitation to be titled
- **Product Category** – use drop down selection to select your product (may be left blank). If using the Product Category at the Header level, the Questions must be entered prior to the Product Category.
- **Purchasing Organization** – always will be SCEIS Purchasing Organization
- **Purchasing Group** – your purchasing group
- **Start Date** – leave blank
- **Submission Deadline**- The opening date & time (End Date in SRM 5.0)
For this exercise type in: **tomorrow’s date, Time: 11:00:00 AM**
- **Opening Date: Date and Time** – Same as the Submission Deadline
- **Valid From / To** – The total potential contract term.
For this exercise type in: **12/01/2013 to 11/30/2018**
- **Award Posting Date** – The date you will make the award
For this exercise type in: **tomorrow’s date**
- **Target Value** – leave blank (unless the vendor community needs to know)
- **Follow-on Documents** – Select one of the options: Purchase order/ Contract / **Purchase Order or Contract** (recommended)
- **Bidder can change RFX Responses** - must be checked
- **SCBO Category** - Select from Drop Down (you will not be able to publish the RFX if a category is not selected.)
- **Partners and Delivery Information** – Defaults from shopping cart. Must be entered if creating an RFX without a shopping cart unless this is a State Term Contract.

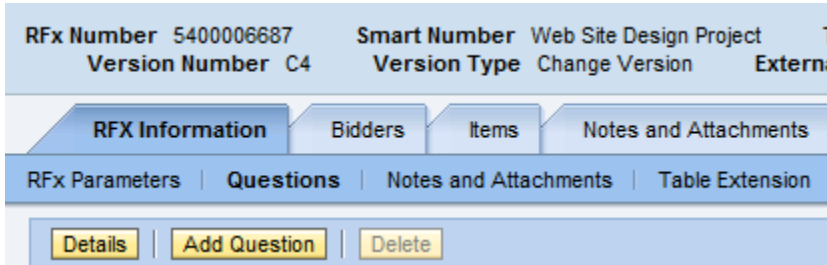
6. Click ‘**Questions**’



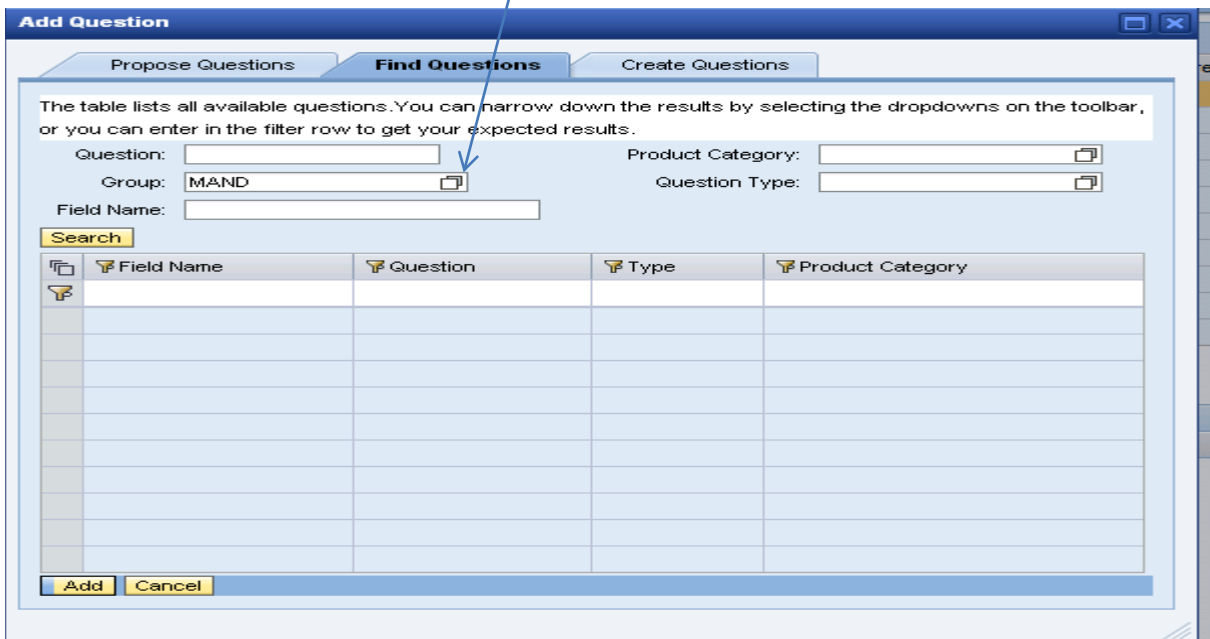
The screenshot shows the 'Display RFX' interface with the following elements:

- Buttons:** Edit, Refresh, Close, Copy, Check, Close Rfx, Responses and Awards.
- Fields:**
 - RFX Number: 5400006687
 - Version Number: 5
 - Smart Number: Web Site Design Project
 - Version Type: Active Version
 - External V: External V
- Tabs:** RFX Information (selected), Bidders, Items, Notes and Attachments.
- Bottom Navigation:** RFX Parameters, Questions (selected), Notes and Attachments, Table Extension.

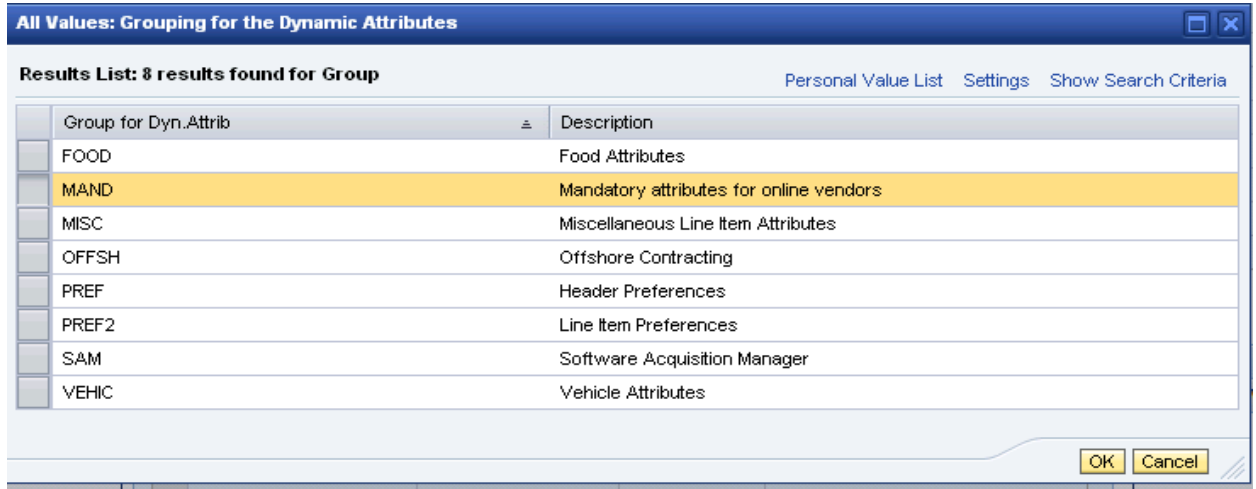
7. Click 'Add Question'



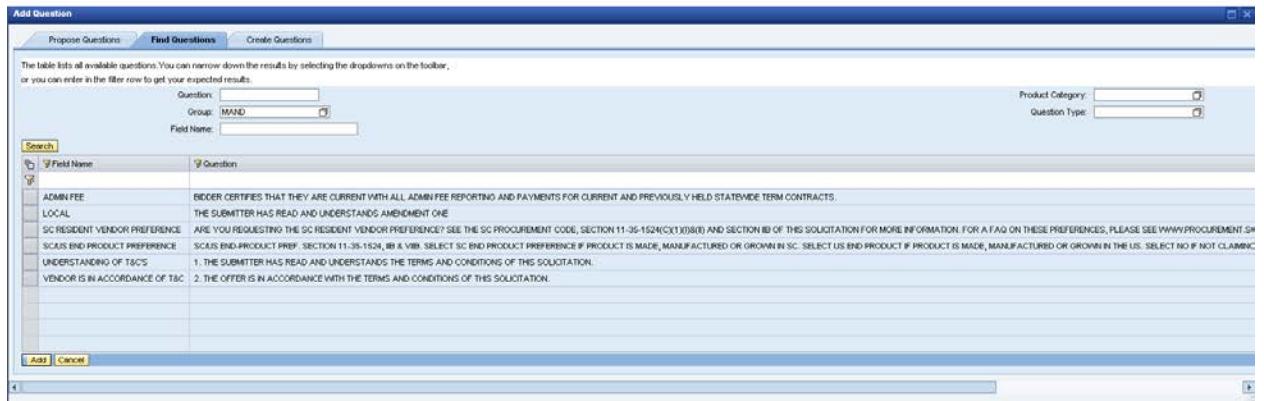
8. Use the Search icon in the Group field to find the pre-loaded questions.



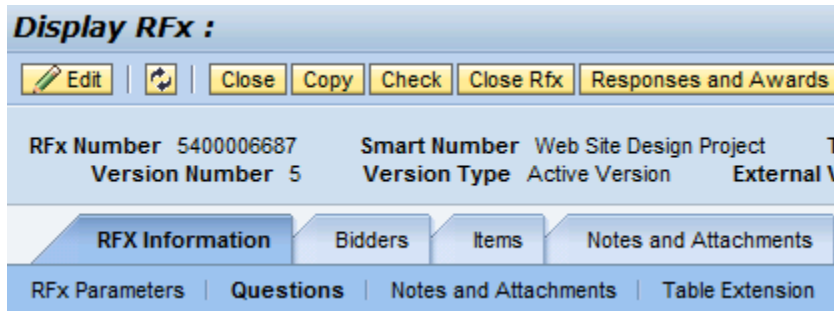
9. Select **MAND** – ‘Mandatory attributes for online vendors’. Click ‘OK’.



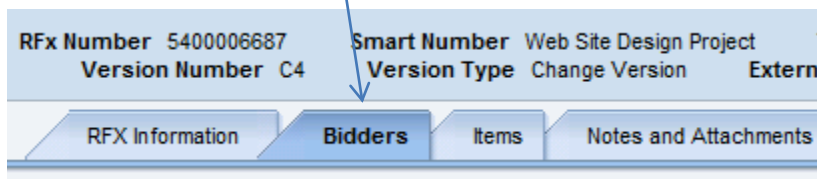
10. Click ‘Search’. This will bring up a list of pre-loaded questions. Select the questions to be added to the solicitation and click ‘Add’



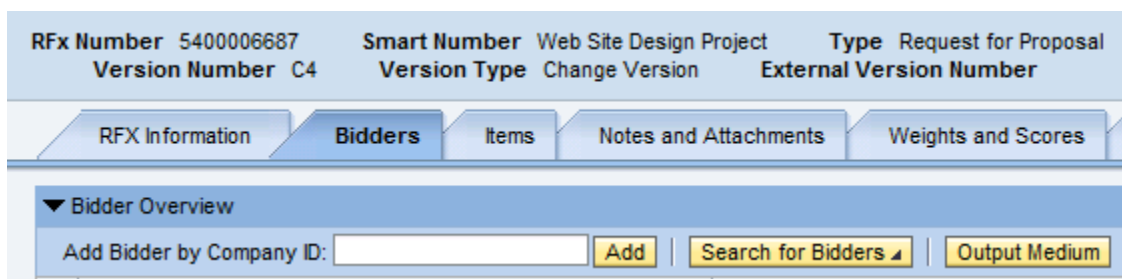
11. Click 'Notes and Attachments' to add header level Tendering Text or an Internal Note, if needed. Text or Notes entered at the header level will NOT appear on the paper version of the solicitation. However, vendors who log-in SRM will be able to read Tendering Text at the Header level.



12. Click 'Bidders' Tab.



13. Click 'Search for Bidders'. A drop-down box will appear, select 'From Internal Directory'.



14. Enter the bidder’s name using an asterisk * in the ‘Company Name 1’ field. In this example type SCEIS*.

Search for Bidders

The table lists all available bidders. You can filter the results by selecting a value from the dropdown menu on the toolbar. You can also enter values in the filter rows.

View By: Bidders Including Contact Persons
Hide Query

Search by Contact Persons

Business Partner Organization:

Company Name 1:

E-Mail:

DUNS:

Postal Code:

Maximum Number of Hits:

Country:

Company Name 2:

Minority Status:

Women Owned:

City:

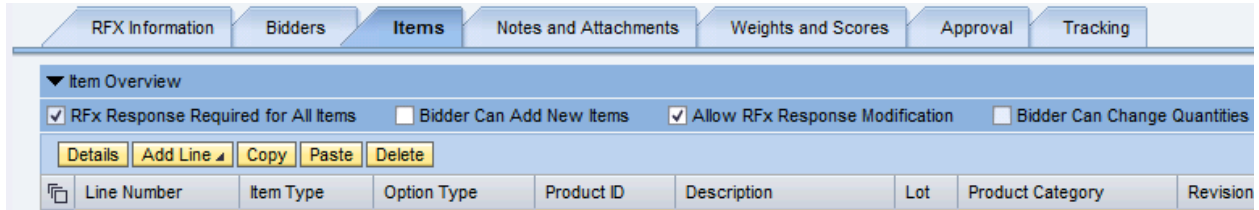
Bidders

	Organization Name	Business Partner Organization	DUNS	Business Partner ID	Last Name	First Name
<input checked="" type="checkbox"/>	CANADIAN PRODUCE MARKETING ASSOC	3948				
<input type="checkbox"/>	VEMCO LIMITED	6253				
<input type="checkbox"/>	SYNDEL LABORATORIES LTD	7265				
<input type="checkbox"/>	HALLPRINT PTY LTD	7781				
<input type="checkbox"/>	AMBUTECH	7783				
<input type="checkbox"/>	IGNITE SALES AND MARKETING	7787		9282	O'GRADY	DAMIEN
<input type="checkbox"/>	REPRESENTATION PLUS (UK) LTD	7788		9281	CRYER	ALISON
<input type="checkbox"/>	FIRST PUBLIC RELATIONS LTD	7789		9283	GORDON	FIONA
<input type="checkbox"/>	ADVANTAGE MANAGEMENT GROUP	7790		9284	RANKIN	NADINE
<input type="checkbox"/>	SCOTT LINSTAD	7891				

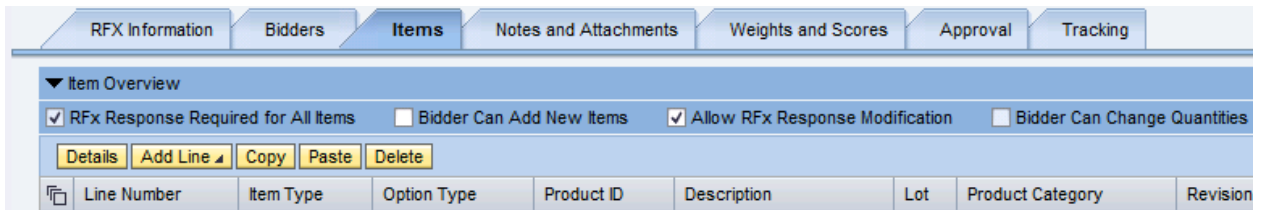
15. Click the ‘Search’ box. Highlight the bidder you wish to add – in this example select SCEIS Bidder.

16. Click ‘Add Selected Bidder’ box.

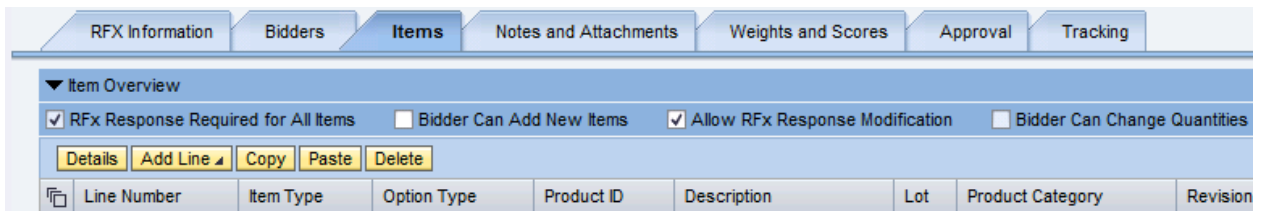
17. Click on the **‘Items’** Tab and check any of the boxes that apply to the type of solicitation you are issuing.





18. To add items, click on the **‘Add Line’** pull down menu and select the appropriate option.



19. Click on the **‘Notes and Attachments’** and add tendering text and/or attachments, if needed. Note: Tendering Text added at the line item level will print on the bid tab and can be viewed by vendors who log into SRM



20. Click **‘Check’**  at the top of the page.

21. If there are no red errors, click **‘Save’** . If you have red errors, correct them, then click **‘Save.’** 