

Exercise 3

Use Document Builder to build a solicitation document and Publish an RFx

Exercise 3: Document Builder

1. Open the RFX that was created and edited in Exercises 1 & 2. The RFX should have a status of “Saved”
2. Click on ‘**Related Links**’ and select ‘**Document Builder**’ from the drop down menu. **Tip:** If the Doc Builder option does not appear, click ‘**Save**’ and try again.
3. Click on the ‘**Dialog**’ tab and answer all questions. Click ‘**next**’ after you answer each question (including the last question) and make sure that all red **X**’s have been turned to a green check mark √

TIP: Some of the questions require you to click ‘**Refresh**’ after you answer them
4. **Optional step, not required:** If you would like to see a list of the clauses in the document you created, Click on ‘**Document Summary**’_Tab. You can add and subtract clauses from this screen.
5. **Optional step, not required:** If you would like to see a preview of the document you created, select the file titled ‘**DocB: Document**’ and Click on the ‘**Preview**’ Tab. This will allow you to preview the RFX document. Then close the preview screen. NOTE: Make sure pop-up blockers are turned off before performing this step.
6. Click ‘**Release**’ when you are satisfied with the document.
7. Click ‘**Log Off**’ to log off of Doc. Builder. When asked ‘**Are you sure you want to log off?**’ - select **Yes**.
8. Go back to the RFX. Click on the **Refresh Icon** ‘’
9. Select the ‘**Notes and Attachments**’ Tab to view the document created. You can click on the blue link in the description column ‘**Solicitation**’ to open and view the document. If you want to make changes to the document, click ‘File-Save As’ and select as a ‘**Word 97-2003 Document (*.doc)**’ for the file type to save a copy to your computer hard drive. Use this saved document to update any clauses that are not in the SCEIS system and add any additional required text (specifications, mandatory minimums, etc.). The final version should be saved to your hard drive/network drive.

10. Once all edits to the solicitation document have been completed off-line, return to the RFx in SRM.
11. Click on **'Edit'**
12. Click on the **'Notes and Attachments'** tab.
13. Click on **'Add Attachments'** in the attachment section. This will open a pop-up window - **'Add Attachment'**.
14. Select **'General Data'** in the **'Assign To'** drop down menu.
15. Click **'Browse'** to search for the document you want to add. Find the final solicitation document on your hard drive/network drive, select the document to add and click **'Open'**.
16. To change the File Name, enter the new file name in the Description field. This is not required. To allow the document to be published to the internet, uncheck the Visible Internally only box. Click **'OK'**.
17. SRM will assign the description "Solicitation" to the attached document. To update the description, select the document and click **'Edit Description'**. Enter the **'New Description'** and click **'OK'**. NOTE: The Description is the title of the document published on the internet.
18. In the **'Attachments'** section under the column titled **'visible Internally only'** check the boxes for the documents you want to be internal only, as all other documents will appear on the internet once the RFx is published.
19. Click **'Publish'**
20. Click the refresh icon'  to update the status of the RFx and to verify that the document is In **'Published'** status.
21. Click on the **'Close'** box at top of screen. **DO NOT CLICK 'CLOSE RFx' – THIS WILL LITERALLY CLOSE THE RFx AND NOT ALLOW ANY FUTURE ACTION TO BE TAKEN (E.G. BIDDERS CANNOT RESPOND TO THE RFx, ETC.)**

22. The bid invitation has now been released and an automatic email has been generated to the vendors that selected the commodity code(s) for this solicitation. The solicitation is automatically published on the SC Procurement website.
23. To validate the posting on the web site you must update the date and time of the posting Go to the Procurement Center website (temporary test site):
<http://webtest.cio.sc.gov/SCSolicitationWeb/solicitationSearch.do>
24. Click the link for your solicitation number to verify posting and activate the posting date/time.
25. To activate your web posting date/time, click Word Document.doc link label '[Word Document.doc](#)'
26. Select  to activate the posting date/time
27. To complete this exercise, click  again