Exercise 4

Publishing an Amendment

Exercise 4: Publishing an Amendment

1. The Amendment document is not created in SCEIS. It is created by the buyer in MS Word and saved to the hard drive/network drive. Once the amendment is completed, it is attached to the RFx in SRM and published to the website.

2. Open the RFx that was created, edited, and published in Exercises 1, 2 & 3. The RFx should have a status of "Published"

3. Click on the **'Notes and Attachments'** Tab.

4. Click on **'Edit'**

5. Click on **'Add Attachments'** in the attachment section. This will open a pop-up window - '**Add Attachment**'.

6. Select **'General Data'** in the '**Assign To'** drop down menu.

7. Click **'Browse'** to search for the document you want to add. Find the amendment document on your hard drive/network drive, select the document to add and click **'Open'.**

8. 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'.**

9. 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.

10. 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.

11. If the amendment makes any changes to the end date or to the bid schedule, make these changes in the RFx in SRM.

12. Click **'Publish'**

13. If you had any errors, it will take you to the **'Edit RFx'** screen and allow you to fix any errors. Otherwise it will be published and you will receive a message like this:

> ☑   RFx Amendment 1 54xxxxxxxxx published
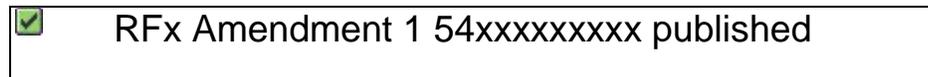
14. The system will take you back to the previous '**Display RFx : 54xxxxxxxx'** screen.

15. Click the refresh icon' ↻ to update the status of the RFx. It should change from **'Awaiting Approval'** to '**Published'** status.

16. Click on the **'Close'** box at top of screen. **DO NOT CLICK 'CLOSE RFx' – THIS WILL LITERALLY CLOSE THE RFx AND NOT ALLOW ANY FUTHER ACTION TO BE TAKEN (E.G. BIDDERS CANNOT RESPOND TO THE RFx, ETC.) Exit SRM**

17. The Amendment has now been published. The Amendment is automatically published on the SC Procurement website as an attachment to the original solicitation. The Procurement Manager will still need to send out emails through the ZMM_BUYER feature that demonstrated in this class.

18. To validate the posting on the web site you must update the date and time of the posting Go to the Procurement Center website: <mark>Test web site</mark>

> http://webtest.cio.sc.gov/SCSolicitationWeb/solicitationSearch.do

19. Click the link for your solicitation number to verify posting. (This is the final step in posting your bid invitation. You will need to activate the posting date/time.

20. To activate your web posting to reflect the current date/time, <mark>click</mark> the **'word document.doc'** link 'Amendment 1.doc'

21. Select [Cancel] to activate the posting date/time or you can choose to open or save the document.
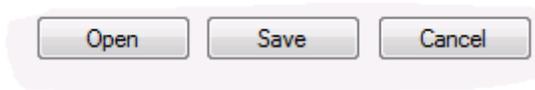
22. To complete this exercise, click again