



Miami-Dade County

Import an RFx Document Job Aid

Version 1.0

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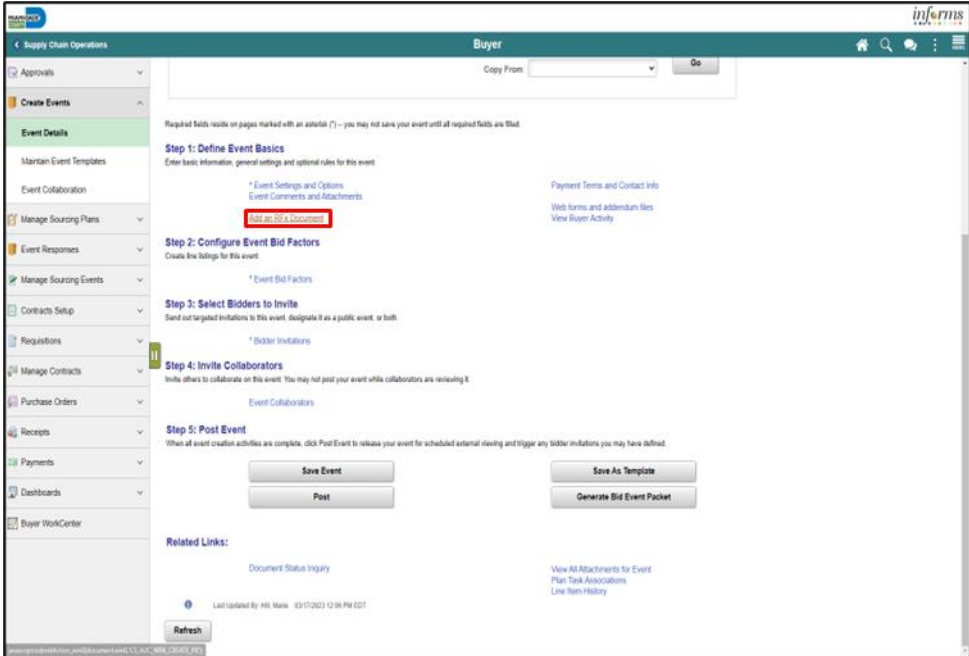
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<i>Purpose</i>	<i>2</i>
ATTACH AN RFX DOCUMENT	Error! Bookmark not defined.

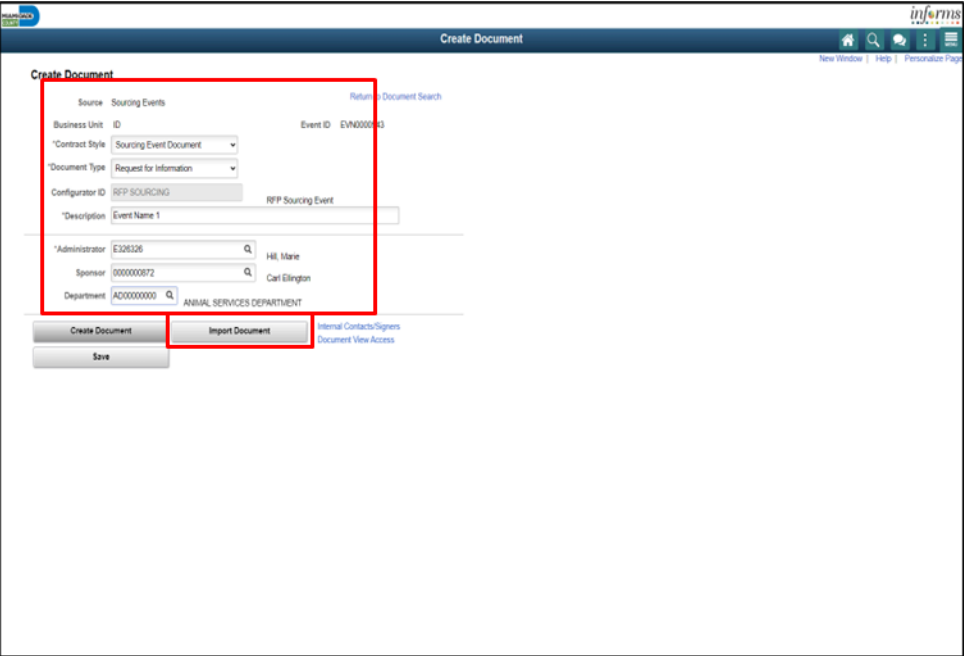
PURPOSE

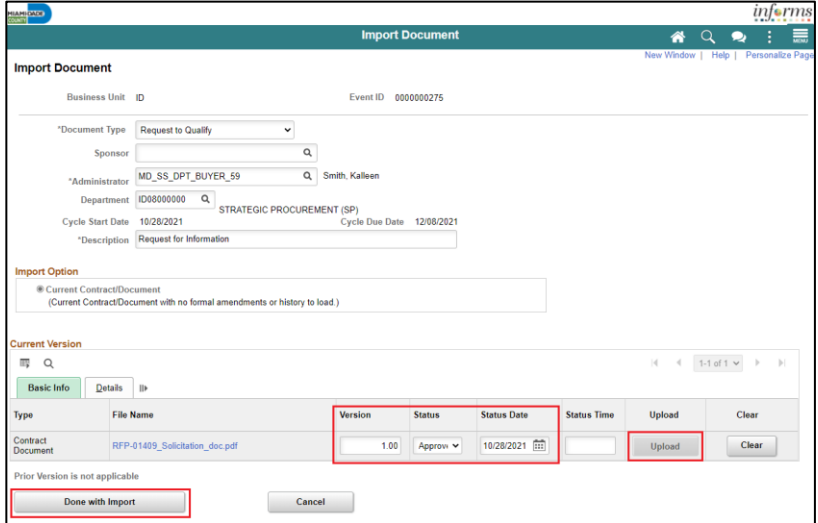
Purpose

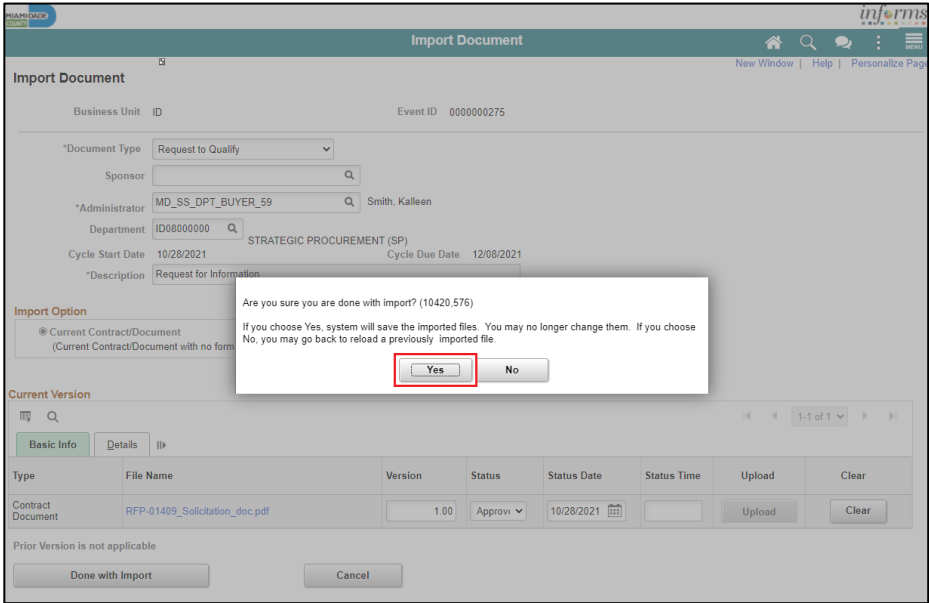
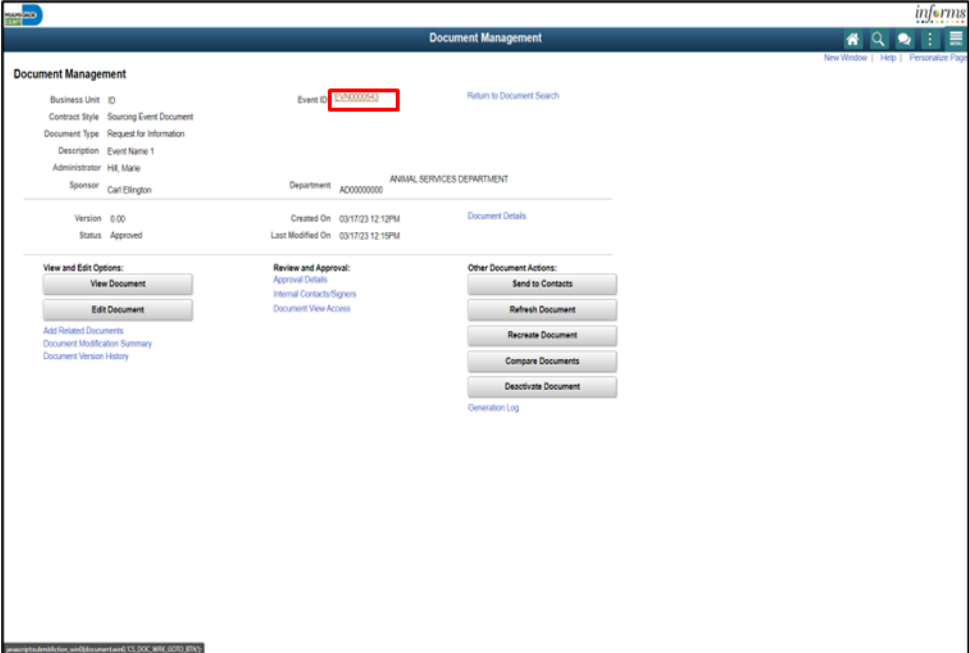
This document explains the key activities involved in attaching an RFx document. It provides an overview of the sub-processes involved, as well as step-by-step procedural guidance to perform the activity.

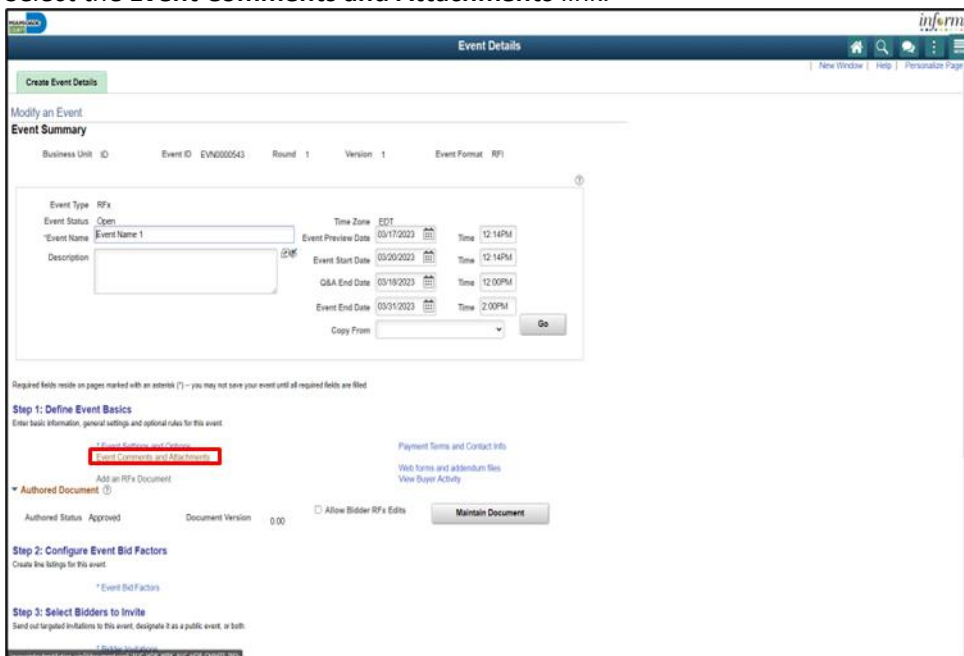
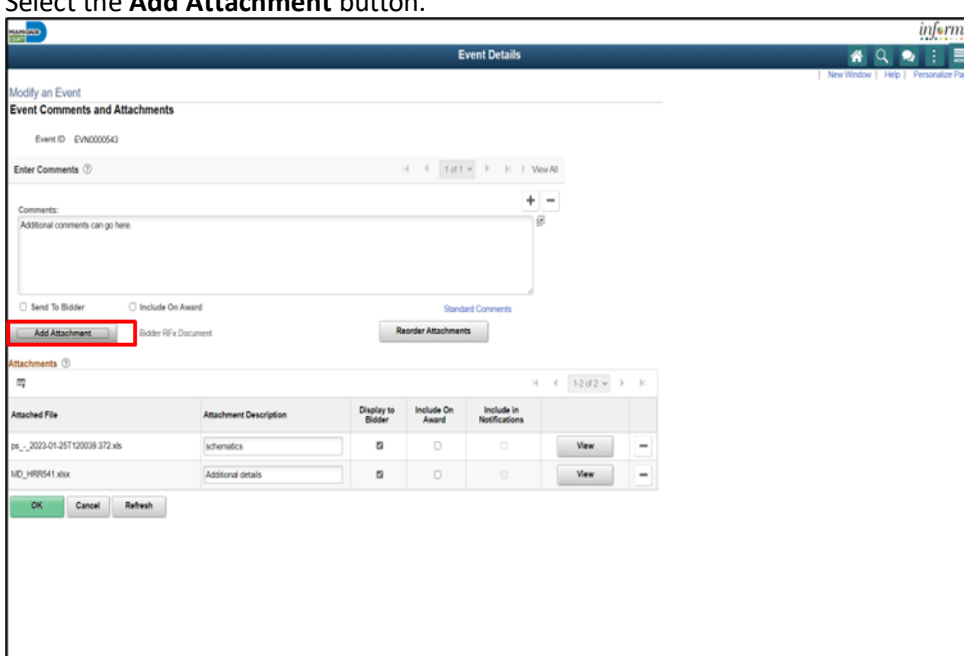
IMPORT AN RFx DOCUMENT

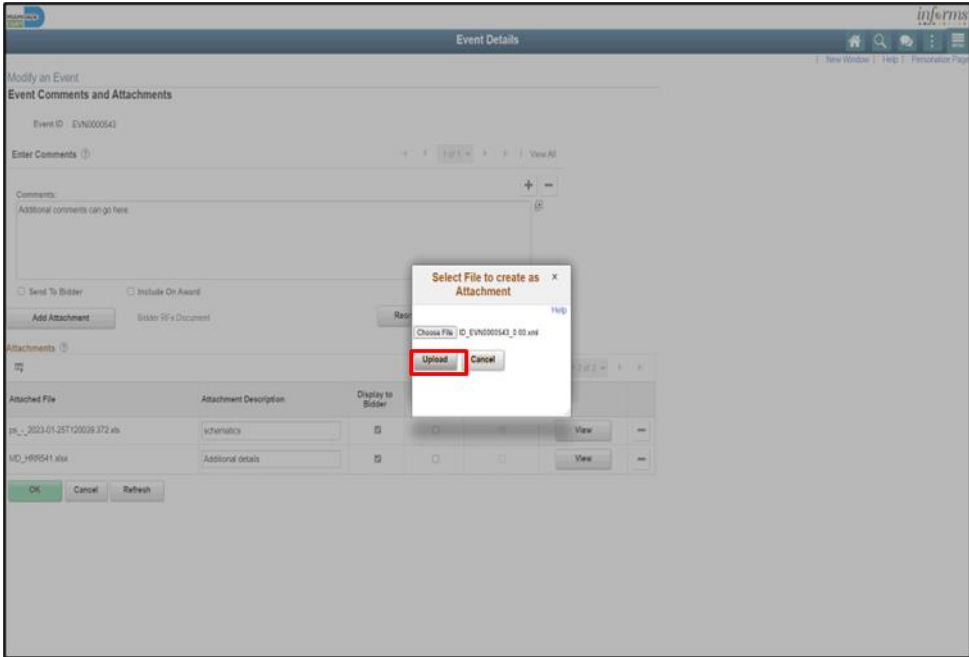
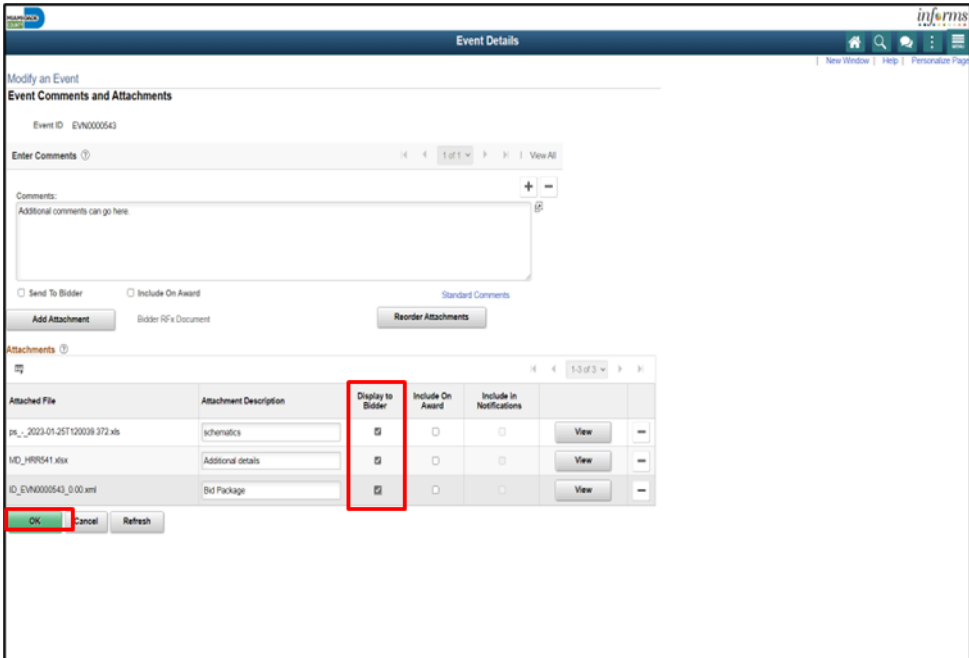
Step	Action
1.	Navigate to Finance/Supply Chain (FSCM) > Finance & Accounting > Supply Chain Operations > Buyer
2.	<p>If returning to an event:</p> <ul style="list-style-type: none"> Select the Find an Existing Value Tab Input any applicable search parameters Select the search button <p>If currently working on an event, continue to Step 3</p>
3.	<p>Select the Add an RFx Document link.</p> <p>Note: The event must be saved and have an event ID before this link becomes available.</p>  <p>The screenshot shows the 'Buyer' interface with a sidebar menu on the left containing options like Approvals, Create Events, Event Details, Manage Sourcing Plans, Event Responses, Manage Sourcing Events, Contracts Setup, Requisitions, Manage Contracts, Purchase Orders, Receipts, Payments, Dashboards, and Buyer WorkCenter. The main content area displays a 'Step 1: Define Event Basics' section with a red box highlighting the 'Add an RFx Document' link. Other sections include 'Step 2: Configure Event Bid Factors', 'Step 3: Select Bidders to Invite', 'Step 4: Invite Collaborators', and 'Step 5: Post Event'. At the bottom, there are buttons for 'Save Event', 'Post', 'Save As Template', and 'Generate Bid Event Packet'.</p>

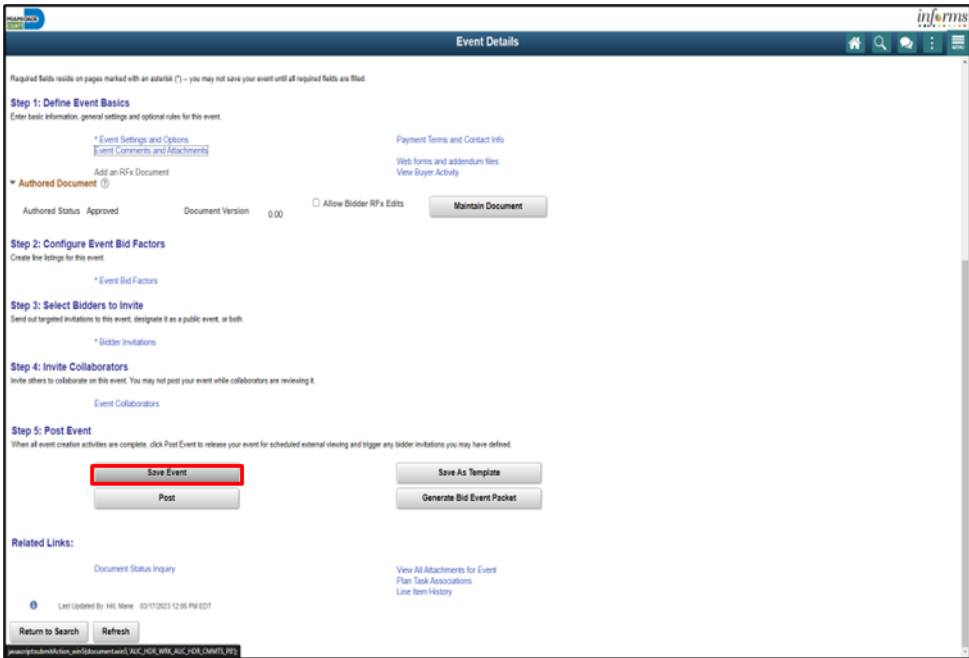
Step	Action
4.	<p>Input or search for the required fields.</p> <ul style="list-style-type: none"> • Contract Style • Document Type • Description • Administrator • Department <p>Select the Import Document button.</p> 

Step	Action
5.	<p>Enter the details in the Basic Info tab.</p> <ul style="list-style-type: none"> Select the applicable option from the Document Type list. Enter 1.0 in the Version field. Select the applicable option from the Status list. If it is to go through the approval process, then the document would have to be brought in in “Draft” status. Enter 'current date' in the Status Date. Select the Upload button. Select the Choose File button. Select the desired file. Note: The file name has a 64 Character Limit. Select the Open button. Select the Upload button. Select the Done with Import button. 

Step	Action
6.	<p>Select the Yes button.</p> 
7.	<p>Select the Event ID link.</p> 

Step	Action
8.	<div>Select the Event Comments and Attachments link.</div> <div></div>
9.	<div>Select the Add Attachment button.</div> <div></div>

Step	Action
10.	<p>Attach the downloaded document.</p> 
11.	<p>Select the Display to Bidder checkbox.</p> <p>Select the OK button.</p> 

Step	Action
12.	<p>Select the Save Event button.</p>  <p>The screenshot displays the 'Event Details' page in the informs system. The page is divided into five main sections, each with a step number and a title. Step 1: Define Event Basics includes links for 'Event Settings and Options', 'Event Comments and Attachments', 'Payment Terms and Contact Info', 'Web forms and addendum files', and 'View Buyer Activity'. Step 2: Configure Event Bid Factors includes a link for 'Event Bid Factors'. Step 3: Select Bidders to Invite includes a link for 'Bidder Invitations'. Step 4: Invite Collaborators includes a link for 'Event Collaborators'. Step 5: Post Event includes a link for 'Document Status Inquiry', 'View All Attachments for Event', 'Plan Task Associations', and 'Line Item History'. The 'Save Event' button is highlighted with a red rectangle. Other buttons visible include 'Add an RFx Document', 'Authorized Document', 'Document Version', 'Allow Bidder RFx Edits', 'Maintain Document', 'Post', 'Save As Template', and 'Generate Bid Event Packet'.</p>